

2016



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“Show Me” the Facts

- ⊕ Missouri’s GDP totaled, an inflation-adjusted, \$261.5 billion in 2015—a 1.3 percent increase over the previous year’s \$258.2 billion.
- ⊕ Between December 2014 and December 2015, 50,000 jobs were added to Missouri payrolls—the largest year-over-year increase in ten years.
- ⊕ Missouri’s Personal income grew 2 percent in 2015 and has averaged an increase of 1.8 percent from 2010 through 2015.
- ⊕ The state’s unemployment rate was 4.3 percent, as of May 2016, the lowest in eleven years.
- ⊕ Missouri is among the most affordable states. In the 1st Quarter 2016 Cost of Living Index, Missouri had the 11th lowest cost of living.
- ⊕ Sixteen percent of Missourians are 65 and over. An aging population also means increased social security, Medicare, and other transfer payments. Transfer payments made up 19.7 percent of Missouri’s total personal income.
- ⊕ The state has a higher labor force participation rate than the nation: 65.7 percent compared to 64.2 percent. Nationally, as well as statewide, the number of older Americans (65+) staying in the labor force is increasing.
- ⊕ The *Food and Lodgings* sector and the *Health Care and Social Assistance* sector, each, added about 9,000 workers between 2014 and 2015. *Professional and Technical Services* added nearly 8,000 workers. The *Information* sector lost around 2,500 workers while *Arts & Entertainment* lost 1,600 workers.
- ⊕ The Kansas City Region had the highest employment growth rate in 2015 (2.87 percent), adding over 14,600 new jobs. The Ozark Region and St. Louis Region also had employment growth rates above 2 percent in 2015.
- ⊕ Across the state, there is high demand (as measured by online job advertisements) for Health Care and Business/Sales positions. In the St. Louis and Kansas City regions the largest demand is for Science and Technology positions.



A Look Back: Missouri Economic Trends, May 2015 - May 2016

In this annual review of the Missouri economy, changes in gross state product, personal incomes, civilian labor force, unemployment, and employment are analyzed for the current period and more broadly over the last ten years. Moreover, in this review, special attention is paid to economic regions within Missouri—their diverse workforce and economies.

Over the last ten plus years, national and state economies have experienced exuberant growth, financial crisis, and a rocky recovery. Nationally, the U.S. boasts a \$16.4 trillion economy. However, the economy contracted about 3.2 percent during the “Great Recession” and has average about 2 percent growth since 2012.

The Missouri economy seemed to navigate the early part of the recession with few disruptions. In 2009, the state’s economy lost \$4.8 billion and another \$3.2 billion in 2011. The state rebounded in economic activity between 2012 and 2015—producing nearly \$10.0 billion in economic activity. In 2015, the Missouri economy grew \$3.3 billion, or 1.3 percent.

As the economic recovery has taken hold, jobs have started to return to the economy both at the national level and in Missouri. Missouri’s unemployment peaked in January of 2010 at nearly 10 percent. Since that time, unemployment has fallen. In May of 2016, the state had its lowest unemployment rate in eleven years at 4.3 percent.

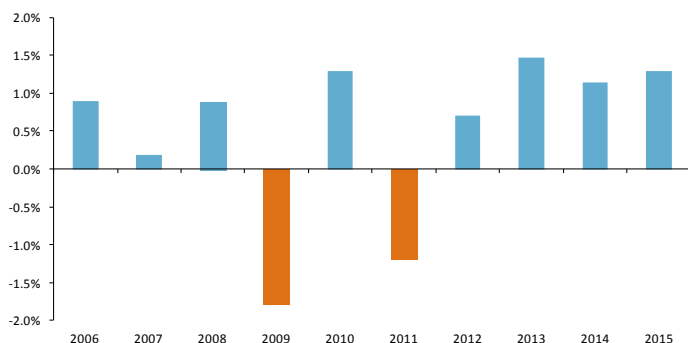
The strengths of the Missouri economy lies in its diverse regions: from the agricultural belt in the North to the hospital-education-government complex in the Central Region to its tourism sector in the Ozarks, to the cosmopolitan and economic centers of St. Louis and Kansas City. Thanks to its economic diversity, Missouri is well positioned to continue its recent economic growth.



Missouri Economy Defined

Gross Domestic Product (GDP) is the broadest measure of economic activity. This measure tracks the market value of goods and services produced within a nation or state for a particular period of time. In 2015, Missouri's GDP was \$261.5 billion (in 2009 constant dollars). This is a 1.3 percent increase over 2014 when State GDP was \$258.2 billion. Nationally, GDP increased 2.4 percent over the same period.

**Real Gross State Product
2006 - 2015 annual growth rate**



Source: U.S. Bureau of Economic Analysis, real GDP in chained dollars, compound annual growth rate, 3rd Quarter to 3rd Quarter

Negative growth in GDP, especially over two consecutive quarters, is one indicator used to identify a recession. According to the National Bureau of Economic Research, the "Great Recession" began in the 4th Quarter of 2007 and ended with the 3rd Quarter of 2009. During that downturn, the national economy contracted 3.9 percent. Missouri's economy contracted 1.2 percent. The State's economy performed better than surrounding states: Iowa (-3.2), Kansas (-3.1), Arkansas (-10.4), and Illinois (-5.4). Part of this may be attributed to the State's industrial diversity. Missouri is among the most economically diverse states in the nation.

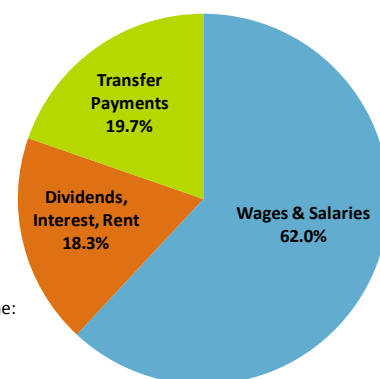
The State experienced negative economic growth in 2011 when it decreased 1.3 percent or by nearly \$3.0 billion. Downturns in the State's agriculture and manufacturing

sectors may explain the overall contraction. The economy has since rebounded. Between 2012 and 2015, Missouri industries produced a total \$9.9 billion in goods and services—growing at an annualized 1.3 percent per year.

Per Capita Personal Income is a rough indicator of the economic well-being of an area's residents. Per capita income is calculated by dividing an area's total personal income by its population. The average income of a Missouri citizen was \$42,752 in 2015 (or in inflation-adjusted dollars \$38,946). Nationally, it was \$47,669 (or in inflation-adjusted dollars \$43,425). While the State's per capita income is lower than the national average, so is the cost of living. Missouri had the eleventh lowest cost of living in the United States in 2015.

Total personal income includes the wages and salaries of workers as well as other income received such as dividends, interest, rent, and transfer payments. Transfer payments refer to social security, Medicare and Medicaid, unemployment insurance, and other government benefits. Incomes are reported before the deduction of taxes.

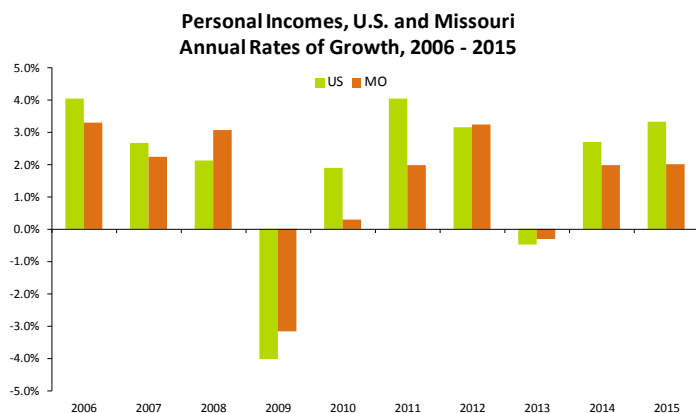
**Components of Personal Income
Missouri - 2015**



Total Personal Income:
\$236,966,256,000
(in 2009 constant \$)

Source: U.S. Bureau of Economic Analysis, 3rd Quarter 2015

Since 2005 Missouri personal incomes have increased, on average, 1.1 percent annually; at the national level, incomes have increased 1.5 percent on average.



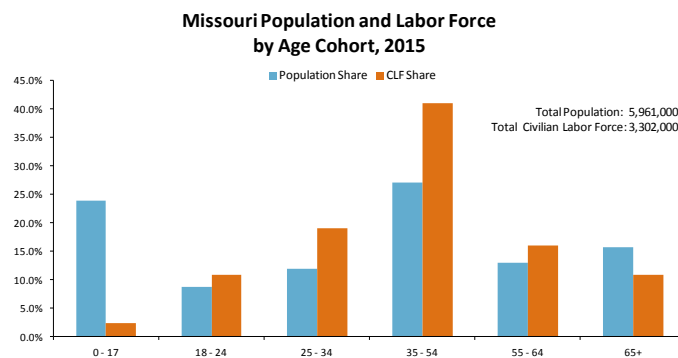
Source: U.S. Bureau of Economic Analysis, compound annual growth rate, 3rd Quarter to 3rd Quarter

The pace of income growth at the national level has generally been faster than the State, with two exceptions—2008 and 2012. The State has followed the national trend of positive but slowing income growth in 2006 and 2007, and negative growth in 2009. Although, Missouri incomes fell at a much slower rate than the Nation that year: -3.2 percent compared to -4.0 percent. In 2010, State incomes returned to stable and steady positive growth. After the recession, from 2010 to 2015, U.S. total personal incomes increased an average 2.7 percent, annually. Missouri incomes increased an average 1.8 percent annually. Among surrounding states, Nebraska and Arkansas incomes increased an average 3.0 percent while Kansas and Iowa incomes increased an average 2.0 percent.

After wages and salaries, the next largest share of total personal income is transfer payments. Transfer payments are monies paid out by government to individuals through Social Security, Disability Insurance, Medicare, Unemployment Insurance compensation, Veterans benefits, Education and Training Assistance programs (Pell Grants for example), and low-income assistance benefits (which include SSI, Medicaid, CHIP, and TANF). The Federal government made roughly \$2.7 trillion in

transfer payments in 2015; Missouri made about \$51.2 billion in such payments to qualified residents. Over the last ten years, the transfer payments share of total personal income has grown by three percentage points: nationally, from 14.2 percent in 2006 to 17.3 percent in 2015; and statewide, from 16.4 percent to 19.7 percent. Social Security and Medicare make up the largest share of transfer payments, i.e., payments to retirees.

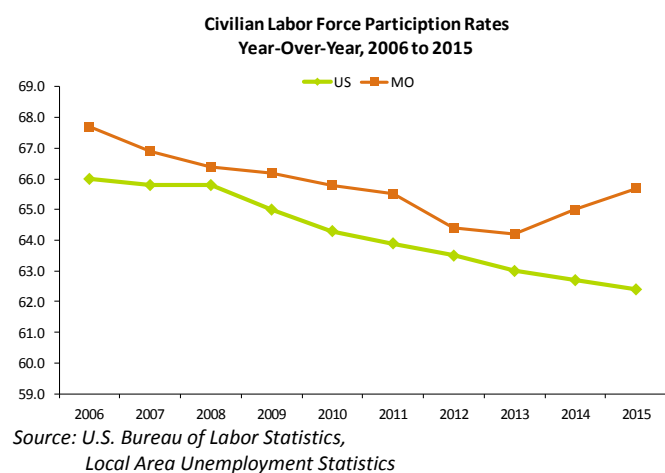
Civilian Labor Force is defined as the number of non-institutionalized persons—16 years and older—who are either gainfully employed or are unemployed but actively seeking work. According to data from the Bureau of Labor Statistics, in 2015, the 35 to 54 age cohort comprise one-third of Missouri's population and 41 percent of its civilian labor force. The 65+ age cohort makes up nearly 16 percent of the population and 11 percent of the civilian labor force. Five years earlier, in 2010, the 65+ age cohort comprised 13 percent of the State's population and a mere four percent of the civilian labor force.



Source: U.S. Census Bureau, Current Population Survey; U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

Income growth, and by extension growth in the economy, is affected by labor force participation. The labor force participation rate (LFPR) is the ratio of the civilian labor force to the population. The National LFPR climbed to a peak of 67 percent by 1990 where it seemed to stabilize. However, since 2001 the LFPR has been falling. In the last ten years, the LFPR has averaged 64.2 percent. In 2015,

the LFPR was at 62.4 percent. Compared to the Nation, more Missourians—as a share of the State’s working age population— participate in the labor force. While the State’s LFPR has also been falling—from 67.7 in 2006 to 64.2 in 2013— a turnaround began in 2014. The State’s LFPR was 65 percent in 2014 and 65.7 percent in 2015. Among Missouri’s neighboring states, Illinois’ participation rate was 64.8 percent while Nebraska and Iowa’s was about 70 percent.

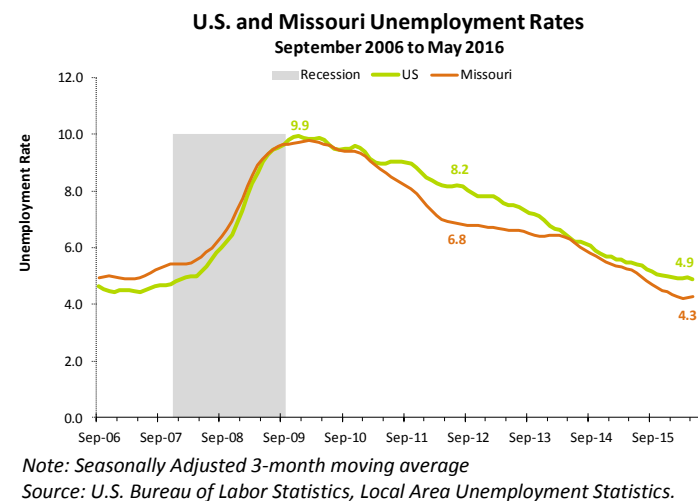


Unemployment Rate measures the number of persons out of work but actively seeking employment relative to the civilian labor force. As of May 2016, the nation’s unemployment rate, based on a three-month moving average, was 4.9 percent. Missouri’s unemployment rate was 4.3 percent.

The State’s unemployment rate was higher than the Nation’s from March 2006 to May 2009, by an average four-tenths of a percent. Over the next several months Missouri effectively mirrored the national unemployment rate. Beginning in January 2011, however, Missouri’s unemployment rate was, on average, six-tenths of a point lower than the nation.

The national unemployment rate was highest in December 2009 at 9.9 percent when 15.1 million Americans were out-of-work; in comparison, Missouri’s

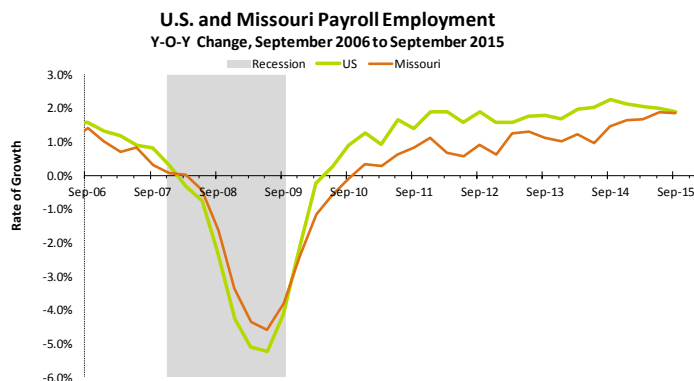
highest rate of 9.8 percent was reached in January 2010 when 298,523 persons were out-of-work. May 2016 marks the State’s lowest rate in eleven years, with 135,168 Missourians out of work.



Nonfarm Payroll Employment increased two percent, nationally, between September 2014 and September 2015: 2.7 million jobs. Statewide, nonfarm payroll employment increased 1.9 percent or by 50,600 jobs.

At the height of the recession, from September 2008 to September 2009, the U.S. lost roughly 7.1 million jobs. From 4th Quarter 2009 through 3rd Quarter 2015, jobs increased at an annualized 1.4 percent—adding a total 12.2 million jobs to the economy. Following the official end of the recession, the nation experienced a rocky recovery. The number of jobs added to the economy increased an average 0.3 percent quarterly from 4th Quarter 2009 to 1st Quarter 2014. At the start of 2nd Quarter 2014, the economy reached 2 percent quarterly employment growth.

Missouri has followed the national pattern, although the State has generally moved at a slower rate than the Nation. The State lost nearly 126,000 jobs at the recession peak; since 4th Quarter 2009, it has added a total 139,000 jobs— a net gain of 13,000.



Note: Year-over-Year, quarterly data

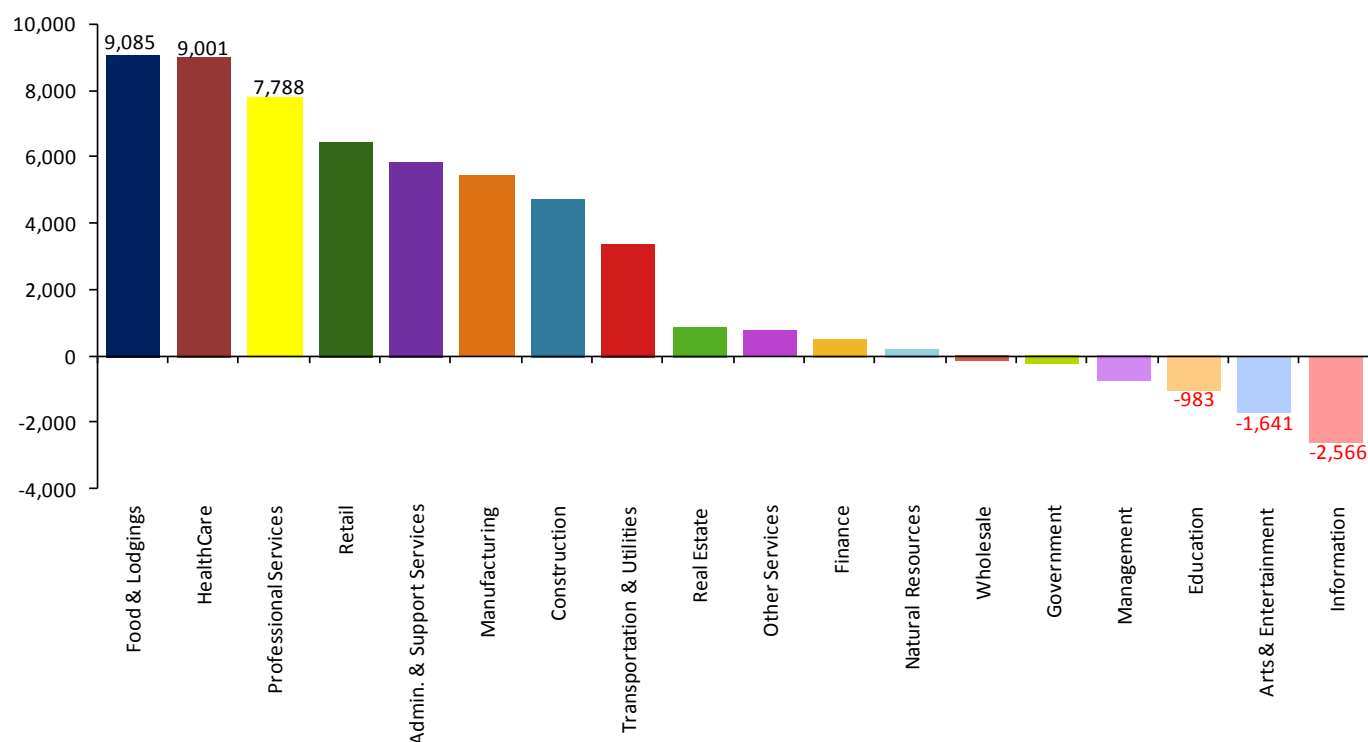
Source: U.S. Bureau of Labor Statistics, Quarterly Census of Employment & Wages

Employment change by industry identifies the types of jobs being created in the state. Industries with decreasing employment indicate those jobs are becoming less present in the State's economy. There may also be industries that behave more cyclically, growing during expansion and decreasing in times of economic slowdown

or contraction. These changes are crucial; they help identify the types of jobs being lost by individuals. Tracking employment change over the year gives a snapshot of employment change over the short-term to see what industries gained and lost employment.

Eleven out of eighteen 2-digit NAICS industries added jobs between 2014 and 2015 on a seasonally adjusted basis. The largest gains for Missouri industry were in *Food and Lodgings* which gained 9,085 workers; *Healthcare* which added 9,001; and *Professional Services* which added nearly 7,800. The *Manufacturing* and *Construction* sectors also added jobs—5,400 and 4,700 respectively. The largest industry losses were in the *Information* sector which lost about 2,600 jobs followed by *Arts and Entertainment* which lost 1,600, and *Education* which lost 980 jobs. With most of the sectors showing employment increases, it bodes well for Missouri's continued economic growth.

Missouri Employment Change by Sector 2014 -2015



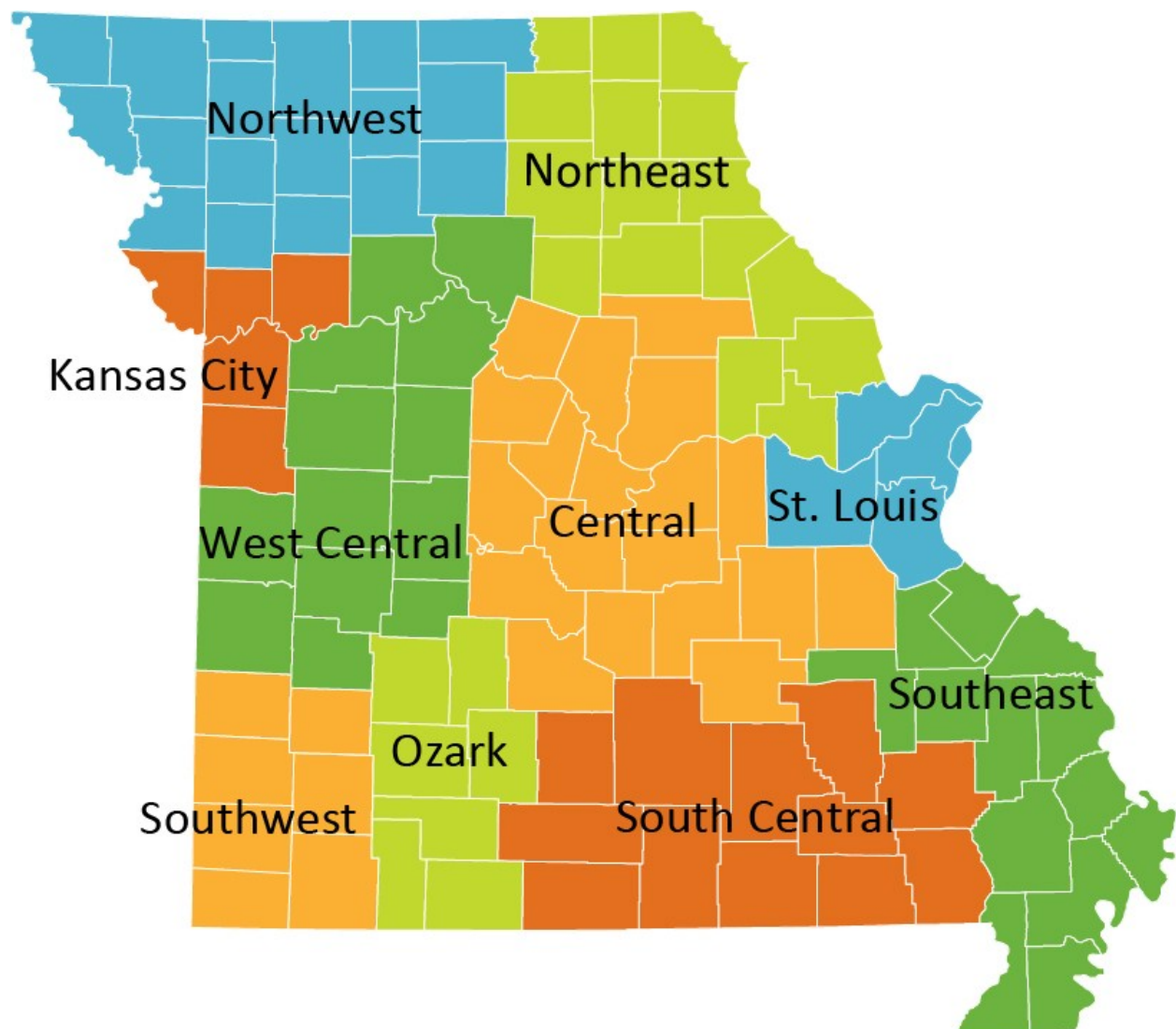
Source: MERIC analysis of the Quarterly Census of Employment and Wages micro-data, 2014- 2015



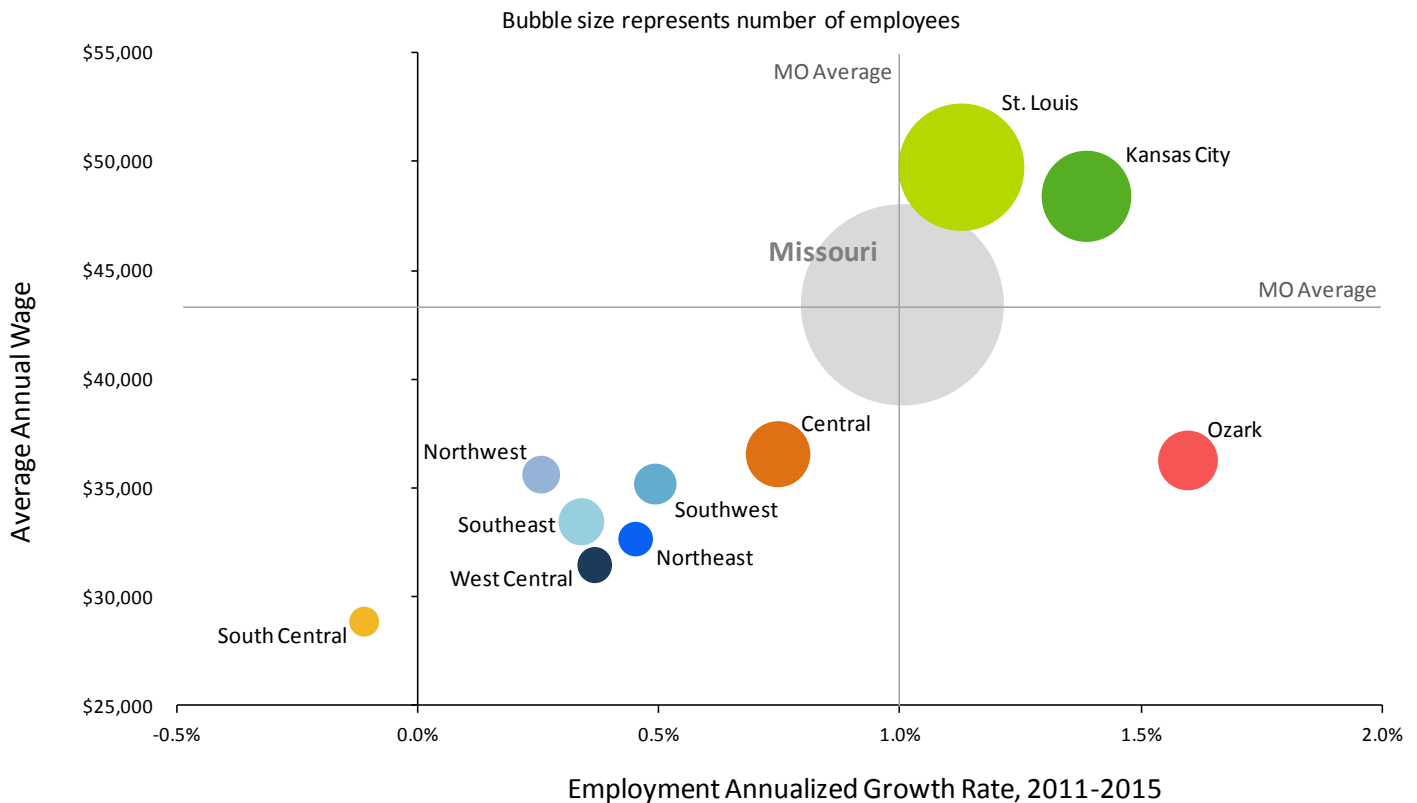
Regional Analysis

The Missouri economy is diverse and varies by geography, natural resources and population, among other factors. To better understand the state economy, the following section analyses the various regional economies. The State is divided into ten regions, as shown in the map below. The regions were developed

using the Workforce Development Areas created by the Workforce Investment Act of 1998 and continued with the Workforce Innovation and Opportunity Act of 2014. (For a list of the economic regions used in this analysis and the counties that make up those regions, see the *Appendix*).



Missouri Regional Economic Profiles, 2015



Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

The *Missouri Regional Economic Profiles* graph helps explain the diversity of the Missouri economy. The graph shows two trends occurring within the regions.

The first trend is among the two largest metropolitan areas, St. Louis and Kansas City (bubbles shown in green). These regions have annualized employment growth between 1 and 1.5 percent and higher annual wages relative to other regions in the state. The large metro areas are more economically diverse and benefit from firms locating near each other.

The second trend occurring is a cluster of more rural regions (bubbles shown in blue). These regions have annualized growth between 0.3 percent and 0.5 percent and have average annual wages between \$31,000 and \$36,000. These regions tend to be less economically drivers, with a heavier reliance on manufacturing and agriculture.

Three regions do not fit into these two main trends. The South Central Region is the only region with negative employment growth from 2011 to 2015, and wages are depressed relative to the rest of the State.

The Central Region is in the middle of the two main clusters in terms of growth rates and annual wages. The Region has the third highest employment in Missouri, and it is home to the state capitol and the largest university in the State. The large public sector employers in the Region help maintain stability in terms of growth rates and wages.

The third Region that does not fit the two main clusters is the Ozark Region. The Ozark Region had the highest growth rate from 2011 through 2015, at over 1.5 percent. This region is heavily reliant on tourism relative to other regions.



Central Region

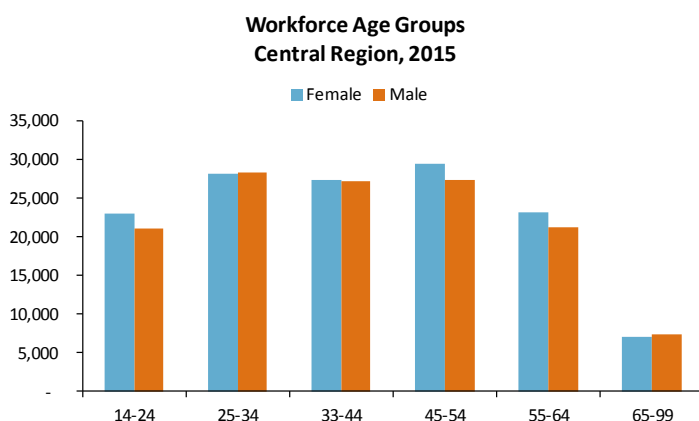
The Central Region is comprised of 19 counties in the center of Missouri. The Region is home to several major cities including Columbia, Mexico, Rolla, Camdenton, Lebanon and the state capitol, Jefferson City.

Many of Missouri's major highways cross through this Region. Interstate 44 runs through the southern part of the Region, while Interstate 70 crosses the northern part. In addition, Highway 50, Highway 54 and Highway 63 cross through the Region.

WORKFORCE DEMOGRAPHICS

The Central Region workforce is over 270,000 employees, making up 11 percent of Missouri employment. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

In the Central Region and in Missouri, 22 percent of the workforce is age 55 or older. The 55 and older age cohort increased five percent since 2006. The increasing age of the workforce mirrors a larger trend that is occurring across Missouri and the United States.



Source: US Census Bureau, Longitudinal Employer-Household Dynamics,

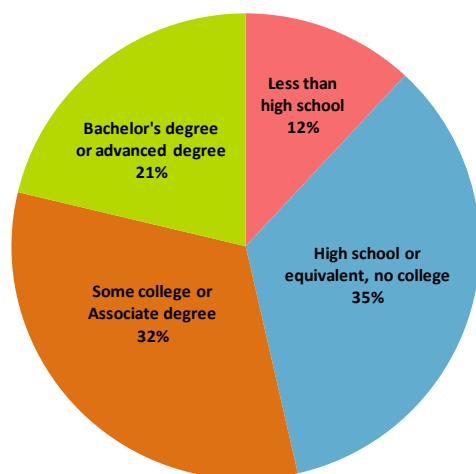


In 2015, 51.1 percent of the workforce was female and 48.9 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 9.6 percent of the workforce was non-white, compared to 15.3 for the State; 2.5 percent of the Region's workforce was Hispanic or Latino, compared to 3.5 for Missouri.

For the Central Region, the primary language spoken at home is something other than English for 6.2 of the population age 18 to 64. That compares to 6.6 percent for Missouri and 22.0 percent for the US. The Central Region has a higher percentage of the population with a disability compared to the State and Nation. For the Central Region, 13.7 percent of the population has a disability compared to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face barriers to employment, and as a result, may fill lower skilled and lower wage jobs.

Educational attainment rates for the Central Region workforce are below that of Missouri for those with a bachelor's or advanced degree. In the Central Region, 88 percent of the workforce has a high school diploma or equivalent and 21 percent has a bachelor's or advanced degree. The Missouri workforce has an 88 percent rate with a high school diploma or equivalent and 23 percent with a bachelor's or advanced degree.

**Educational Attainment
Central Region, 2015**



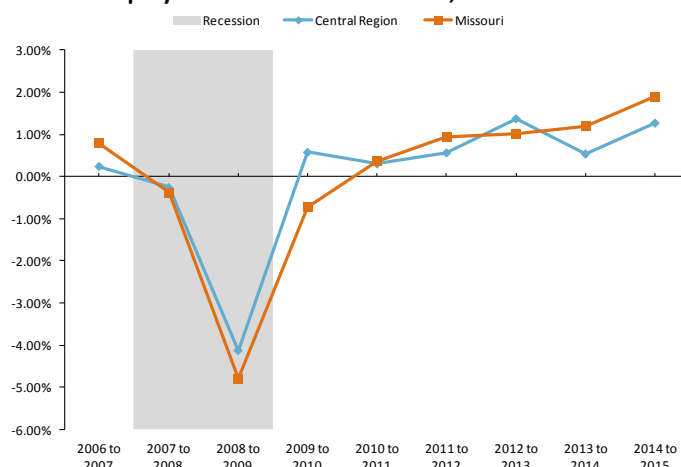
Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

INDUSTRY ANALYSIS

In 2007, employment levels in the Central Region reached over 273,000. By 2009, employment levels dropped below 261,300. From 2011-2015, 10,794 new jobs were added to the Region with an annualized growth rate of 0.8 percent. 2015 marked the first year since the recession where employment surpassed pre-recession levels in the Central Region.

In 2015, regional employment increased 1.3 percent. Statewide, employment increased 1.9 percent. The Central Region had lower levels of job decline during the recession than the rest of the state. The regional employment growth has been lower than the Missouri average in four of the last five years.

Employment Annual Growth Rate, 2006 - 2015



Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

The large *Health Care and Social Assistance* and *Educational Services* industries within the Region help explain the lower impact of the Recession. The Central Region has a high concentration of Health Care providers and is home to three public universities, including the state's largest university, the University of Missouri, Columbia. During the last recession, *Nursing and Residential Care Facilities* gained 318 jobs, *Social Assistance* gained 620 jobs and *Educational Services* gained 513 jobs.

Largest Employers in Central Region

Some of the largest employers in the area are health care providers, including, **Boone Hospital, Phelps County Regional Medical Center, Capitol Region Medical Center** and the **Fulton State Hospital**.

There is a substantial presence in the financial/professional services industry with **MetLife, State Farm Insurance, Veterans United Home Loans** and **Shelter Insurance** located in the Region.

The Region is home to a large number of public sector jobs as the Central Region has multiple state universities, including the **University of Missouri, Columbia**, the State capitol, Jefferson City, and the US Army base **Fort Leonard Wood**.

Table 1: Central Region Top Industries by Employment, 2015					
Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Health Care and Social Assistance	41,474	44,689	3,215	1.5%	\$39,878
Retail Trade	35,122	36,733	1,611	0.9%	\$24,800
Public Administration	30,485	29,187	(1,299)	-0.9%	\$41,332
Accommodation and Food Services	27,040	28,107	1,067	0.8%	\$15,415
Educational Services	26,292	26,251	(41)	0.0%	\$45,944
Manufacturing	23,401	24,224	823	0.7%	\$41,181
Construction	12,293	12,483	190	0.3%	\$42,670
Administrative and Support Services	8,043	10,614	2,571	5.7%	\$24,738
Finance and Insurance	9,210	9,281	71	0.2%	\$51,592
Prof., Scientific, and Tech Services	7,411	8,281	869	2.2%	\$53,933

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Public Administration was one major employment industry for the Region that did see a sizeable decrease in employment from 2011 through 2015. *Public Administration* employment decreased nearly 1,300 jobs over the five year period (see *Table 1*).

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. As seen in *Table 2*, the Central Region has high concentrations in advanced manufacturing, including *Electrical Equipment Manufacturing* and *Wood Product Manufacturing*. Other concentrated industries include *Nonstore Retailers* and *Printing and Related Support Activities*.

LABOR MARKET ANALYSIS

Unemployment

The regional unemployment rate reached 10.5 percent in February of 2010. By the end of 2015, the unemployment rate fell below four percent. This mirrors state and national trends, with the regional unemployment rate consistently staying below the state and national unemployment rates.

Table 2: Central Region Location Quotients		
Industry Sector	Employment	Location Quotient
Electric Equip/Appliance/ Component Mfg.	2,525	3.4
Nonstore Retailers	2,358	2.4
Printing and Related Support Activities	2,008	2.3
Wood Product Mfg.	1,700	2.3
Gasoline Stations	3,820	2.1
Utilities	1,916	1.8
Building Material /Garden Equip Dealers	3,398	1.4
Motor Vehicle and Parts Dealers	5,255	1.4
Nonmetallic Mineral Product Mfg.	1,076	1.4
Sporting/Hobby/Musical/Book Stores	1,583	1.3
Nursing and Residential Care Facilities	8,400	1.3
Plastics and Rubber Products Mfg.	1,738	1.3

Review of private businesses only.

Includes only employers with 1,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Real-Time Labor Market Summary

Unemployment rates are dependent on overall economic health and aggregate demand within an economy, but it is also impacted by the ability of the labor force to meet the demand for jobs within the region. To better understand the labor supply and demand, a review was completed of the skills possessed by job seekers and comparing that to the online job ads in the region.

Table 3 provides a count of online job ads in 2015 for the Central Region and compares it to job seeker data for people who registered with jobs.mo.gov.

The Real Time Labor Market Analysis shows that *Health Care* and *Business/Sales* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage of workers seeking opportunities in these industry sectors. There may be an oversupply in the areas of *Construction/Maintenance* and *Production* related fields, especially for lower skilled job seekers.

Top Ten Job Postings, 2015	
Occupation	Job Postings
Truck Drivers	3,057
Registered Nurses	2,032
Retail Salespersons	1,477
Sales Reps., Wholesale and Mfg	949
First-Line Supervisors for Retail	870
Customer Service Reps.	804
Managers	558
Computer Occupations	491
LP and LV Nurses	465
Health Services Managers	424

Source: Burning Glass Technologies, Labor Insight

Table 3: Real Time Labor Market Analysis, Central Region 2015										
	Total	Health Care & Related	Business & Sales	Science & Technology	Transportation	Other Services	Food Service	Management & Support	*CIMR	Production
Number of Job Ads	30,080	7,563	5,592	2,881	2,951	1,876	1,191	5,315	1,850	861
% of Job Ads	100%	25.1%	18.6%	9.6%	9.8%	6.2%	4.0%	17.7%	6.2%	2.9%
Number of Jobseekers	16,729	1,384	1,402	443	1,044	962	1,229	3,688	2,444	4,133
% of Jobs Sought	100%	8.3%	8.4%	2.6%	6.2%	5.7%	7.3%	22.0%	14.6%	24.7%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. Table 4 lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers*, *Customer Service Representatives*, and *Freight and Stock Movers*, project high growth and replacement openings. Due to high turn-over rates, these occupations have more replacement openings relative to other occupations.

Skilled occupations with fewer replacement openings but high growth rates include *Registered Nurses* and *General and Operations Managers*. Middle skilled jobs or jobs that require an associate's degree, technical degree or some post high school training showing growth in the Central Region include medical professions such as

Nursing Assistants, *Medical Secretaries* and *Pharmacy Technicians*. Skilled building occupations such as *Plumbers and Pipefitters* and *Carpenters* also fall into this category.

Table 4: Central Region Long-Term Occupation Projections					
Occupation	2012 Estimated Employ- ment	2022 Projected Employ- ment	Growth Openings	Replace- ment Openings	Total Openings
Food Prep/Serving	7,275	8,436	1,161	2,778	3,939
Retail Salesperson	9,054	9,862	808	3,097	3,905
Cashier	7,827	8,155	328	3,384	3,712
Waiter/Waitress	5,372	5,707	335	2,585	2,920
Registered Nurse	6,297	7,127	830	1,221	2,051
Office Clerk	7,076	7,583	507	1,487	1,994
Nursing Assistant	5,338	6,099	761	1,015	1,776
Freight/Stock Mover	3,954	4,478	524	1,225	1,749
Cust Service Rep	3,921	4,507	586	1,067	1,653
General/Ops. Mngr	5,003	5,680	677	936	1,613

Source: MERIC Occupational Projections



Kansas City Region

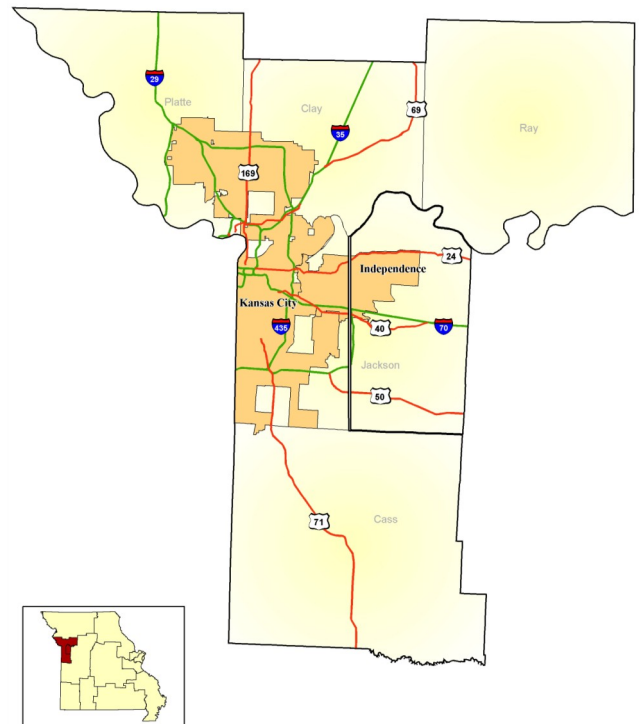
The Kansas City Region is comprised of five counties in the West Central part of Missouri. The Region is home to several major cities including Kansas City and Independence.

Many of Missouri's major highways cross through this Region. Interstate 70 runs through the center of the region, while Interstate 29 and Interstate 35 and 435 cross through the Region. In addition, Highway 24, Highway 40, Highway 50, Highway 69, Highway 71 and Highway 169 cross through the Region.

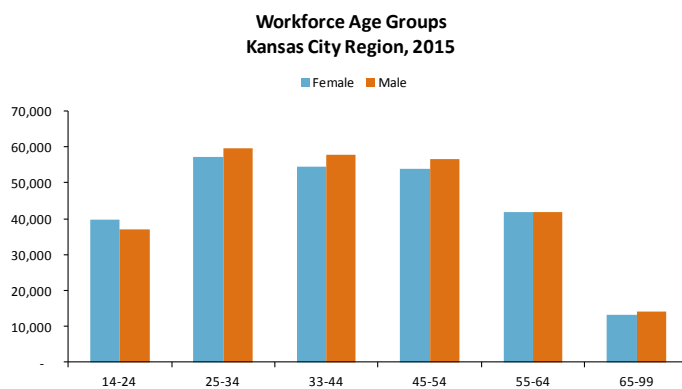
WORKFORCE DEMOGRAPHICS

The Region is home to over 525,000 employees who make up 20 percent of Missouri's workforce. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

In the Kansas City Region, 21 percent of the workforce is age 55 or older, compared to 22 percent for Missouri. The 55 and older age cohort increased five percent since 2006. The aging of the workforce mirrors a larger trend that is occurring in Missouri and the United States.



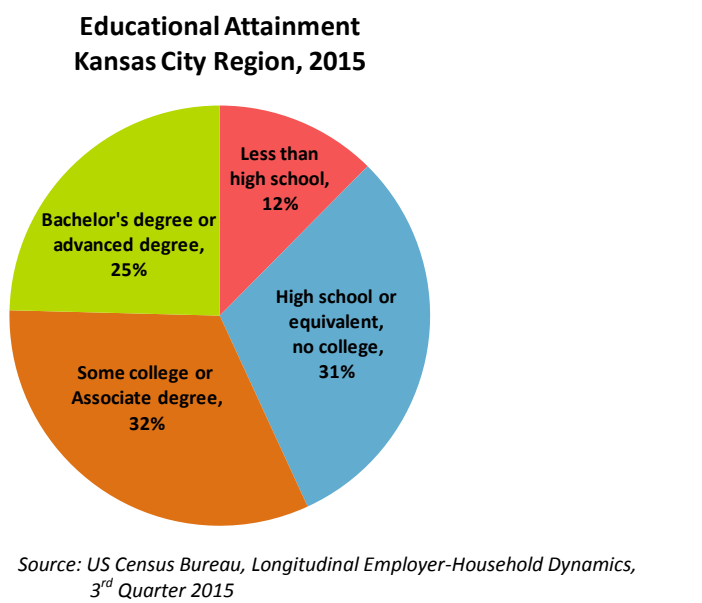
In 2015, 49.4 percent of the workforce was female and 50.6 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 18.1 percent was non-white, compared to 15.3 for the State; 5.5 percent was Hispanic or Latino, compared to 3.5 percent for Missouri.



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

For the Kansas City Region, the primary language spoken at home is something other than English for 8.3 percent of the population age 18 to 64. That compares to 6.6 for Missouri and 22.0 percent for the US. The Kansas City Region has a lower percentage of the population with a disability compared to the State. For the Region, 11 percent of the population has a disability compared to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

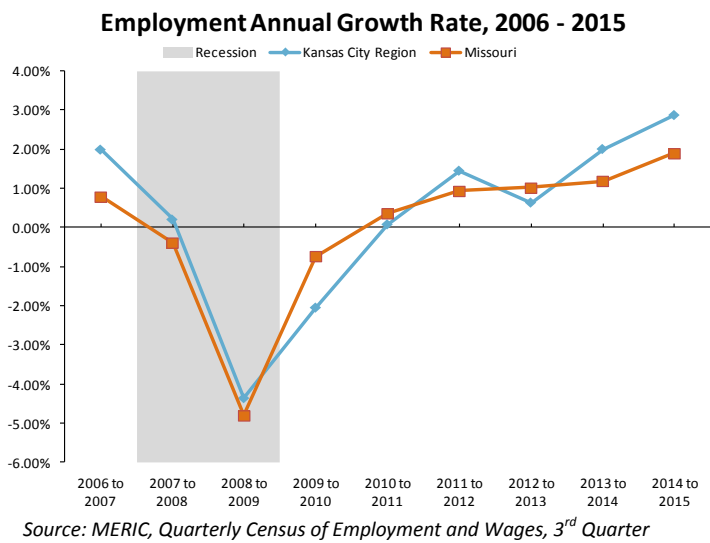
Educational attainment rates for the Kansas City Region workforce are above that of the rest of Missouri for those that completed a bachelor's or advanced degree. In the Kansas City Region, 88 percent of the workforce has a high school diploma or equivalent and 25 percent has a bachelor's or advanced degree. The Missouri workforce has an 88 percent rate with a high school diploma or equivalent and has 23 percent with a bachelor's or advanced degree.



INDUSTRY ANALYSIS

The Kansas City Region had employment levels of 523,000 in 2008; by 2010, employment levels dropped to nearly 490,000. Since 2010, the Region has added over 35,000 jobs. From 2011 to 2015, employment levels grew at an annualized growth rate of 1.4 percent.

In 2015, the Region had a 2.9 percent growth in employment, which was the highest growth rate of any Region in Missouri. The growth rate was above two percent in 2014 and 2015



Health Care and Social Assistance represents 15 percent of all employment in the Region. *Retail Trade, Accommodations and Food Service, Professional, Scientific, and Technical Services* and *Manufacturing* all represent between eight and 11 percent of employment in the Region.

Health Care and Social Assistance has grown steadily over the past decade, showing positive employment growth in nine out of ten years. From 2011 to 2015, *Health Care*

Largest Employers in Kansas City Region

The largest employers in the Kansas City Region come from a variety of industry sectors. Top health care employers include **St. Luke's Hospital**, **North Kansas City Hospital** and **The Research Medical Center**.

Technology Companies such as **Cerner** and **DST** and manufactures such as **Ford** and **Honeywell** are located in the Region; as is the engineering firm **Burns & McDonnell Engineering**. **Hallmark**, with its corporate headquarters in Kansas City, is also a major employer.

The **University of Missouri, Kansas City** is a major public employer in the Region.

Table 1: Kansas City Region Top Industries by Employment, 2015

Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Health Care and Social Assistance	71,258	78,790	7,533	2.0%	\$48,929
Retail Trade	56,092	57,352	1,260	0.4%	\$27,111
Accommodation and Food Services	47,451	53,277	5,826	2.3%	\$18,344
Professional, Scientific, and Tech. Services	34,859	42,355	7,496	4.0%	\$79,678
Manufacturing	37,151	42,120	4,970	2.5%	\$56,275
Educational Services	33,148	33,466	318	0.2%	\$38,508
Administrative and Support Services	24,951	28,743	3,792	2.9%	\$31,429
Finance and Insurance	27,365	27,161	(204)	-0.1%	\$75,424
Public Administration	26,500	26,068	(432)	-0.3%	\$61,841
Construction	21,510	25,397	3,888	3.4%	\$59,079

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

and Social Assistance grew an annualized two percent, adding over 7,500 new jobs over that time. *Professional, Scientific and Technical Services* lost 2,200 jobs from 2008 to 2010. Since 2010, it has been one of the fastest growing industry sectors in the Region. From 2011 to 2015, it grew an annualized four percent, adding nearly 7,500 jobs.

The Region lost 6,400 manufacturing jobs from 2007 to 2012. Since 2012, nearly 5,000 manufacturing jobs were added. *Accommodations and Food Services* grew every year from 2006 to 2015 except for 2009. From 2011 to 2015, 5,826 jobs were added in that sector. *Retail Trade* had declining employment from 2006 to 2013, losing 2,200 jobs. From 2013 to 2015, 1,800 jobs have been added. *Table 1* provides a list of the top ten industry sectors for the Region based on employment.

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. The Kansas City Region has high concentrations in *Data Processing*, *Transportation Manufacturing* and *Truck Transportation*.

Table 2: Kansas City Region Location Quotients

Industry Sector	Employment	Location Quotient
Data Processing and Hosting	N/A	2.7
Transportation Equipment Mfg	11,721	1.9
Performing Arts/Spectator Sports	3,046	1.7
Support Activities for Transport	3,921	1.6
Securities/Commodity Contracts	5,121	1.5
Mgmt of Companies/Enterprises	11,073	1.3
Warehousing and Storage	4,106	1.3
Prof., Scientific, and Tech. Services	41,805	1.3

Review of private businesses only.

Includes only employers with 3,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

LABOR MARKET ANALYSIS

Unemployment

The unemployment rate in the Region has consistently fallen from its peak in 2010. The regional unemployment rate reached 10.3 percent in February of 2010. By the end of 2015, the unemployment rate fell to 4.0 percent. This mirrors state and national trends, with the Region consistently maintaining unemployment rates slightly above the state average.

Real-Time Labor Market Summary

Unemployment rates are dependent on overall economic health and aggregate demand within an economy, but it is also impacted by the ability of the labor force to meet the demand for jobs within the region. To get a better understanding of the labor supply and demand within the region, a review was completed of the skills possessed by job seekers and comparing that to online job ads for the region.

Table 3 provides a count of online job ads in 2015 for the Kansas City Region and compares it to job seeker data for people who registered with jobs.mo.gov.

Top Ten Job Postings 2015	
Occupation	Job Postings
Registered Nurses	5,069
Truck Drivers	4,312
Sales Representatives, Wholesale/Mfg	3,329
Retail Salespersons	3014
Computer Occupations	2855
Software Developers	2833
Customer Service Reps	2258
Managers	1952
First-Line Supervisors for Retail	1838
Accountants and Auditors	1419

Source: Burning Glass Technologies, Labor Insight

Table 3: Real Time Labor Market Analysis, Kansas City Region 2015										
	Total	Science & Technology	Business & Sales	Health Care & Related	Other Services	Transportation	Food Service	Production	*CIMR	Management & Support
Number of Job Ads	89,853	14,480	17,310	15,404	5,446	6,837	2,846	2,461	5,137	19,932
% of Job Ads	100%	16.1%	19.3%	17.1%	6.1%	7.6%	3.2%	2.7%	5.7%	22.2%
Number of Jobseekers	19,508	673	1,917	1,865	1,142	1,734	1,274	1,916	2,781	6,207
% of Jobs Sought	100%	3.4%	9.8%	9.6%	5.9%	8.9%	6.5%	9.8%	14.3%	31.8%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

The Real Time Labor Market Analysis indicates high demand for *Science/Technology*, *Business/Sales* and *Health Care* related jobs. The analysis further shows a shortage of workers in the Region for these industries. The analysis shows an oversupply of job seekers for occupations such as *Management/Support*, *Construction/Maintenance* and *Production* related fields, especially for lower skilled jobs.

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. Table 4 lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers*, *Customer Service Representatives*, *Janitors/Cleaners* and *Secretaries and Administrative*

Table 4: Kansas City Region Long-Term Occupation Projections					
Occupation	2012 Estimated Employ- ment	2022 Projected Employ- ment	Growth Openings	Replace- ment Openings	Total Openings
Food Prep/Serving	14,598	16,451	1,853	5,574	7,427
Retail Salesperson	14,709	15,614	905	5,031	5,936
Waiter/Waitress	10,700	11,093	393	5,148	5,541
Cashier	11,961	12,169	208	5,171	5,379
Cust Service Rep	9,257	10,485	1,228	2,519	3,747
Registered Nurse	11,752	13,084	1,332	2,278	3,610
General/Ops. Mngr	11,828	13,187	1,359	2,213	3,572
Office Clerk	11,954	12,748	794	2,511	3,305
Freight/Stock Mover	6,706	7,575	869	2,077	2,946
Janitor and Cleaner	8,227	9,507	1,280	1,548	2,828

Source: MERIC Occupational Projections

Assistants are projected to have high growth openings and replacement openings. Because of high turn-over rates, these occupations have more replacement openings relative to other occupations.

Skilled occupations that have fewer replacement openings but high growth openings include *Registered Nurses, General and Operations Managers, Software Developers, Computer Systems Analysts and Accountants and Auditors*. Middle skilled jobs or jobs that require an associate's degree, technical degree or some post high school training other than a bachelor's degree that are showing growth in the Kansas City Region include *Nursing Assistants, Truck Drivers, Cooks and Carpenters*.



Northeast Region

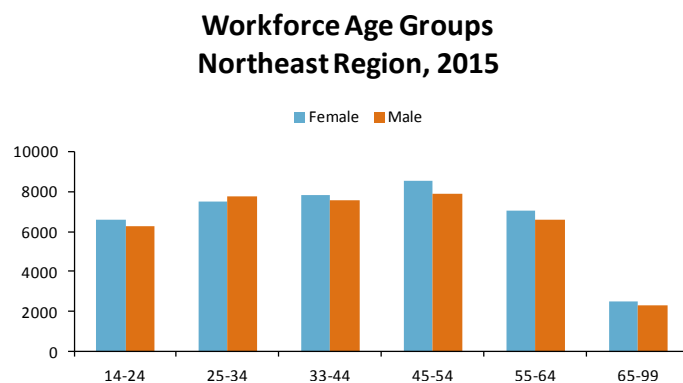
The Northeast Region consists of 16 counties in Northeastern Missouri. This region is home to several major cities including, Kirksville, Hannibal, Moberly and Warrenton.

Several of Missouri's major highways cross through this Region. Interstate 70 crosses the southern part of the Region. In addition, Highway 63 and Highway 61 run north/south and Highway 24, Highway 54, Highway 36 and Highway 136 run east/west.

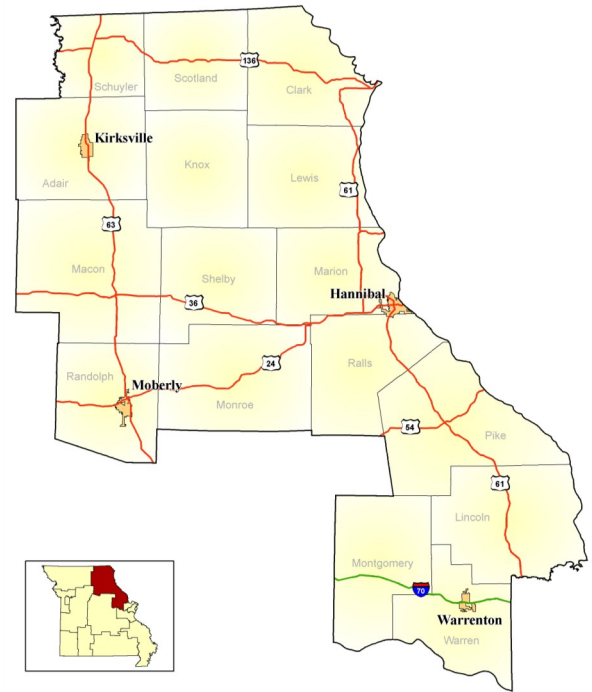
WORKFORCE DEOMOGRAPHICS

The Region is home to over 77,000 employees who make up three percent of Missouri's workforce. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

In the Northeast Region, 24 percent of the workforce is age 55 or older, which is slightly above the 22 percent for the state of Missouri. The 55 and older age cohort increased six percent since 2006. The increasing age of the workforce mirrors a larger trend that is occurring in Missouri and the United States.



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

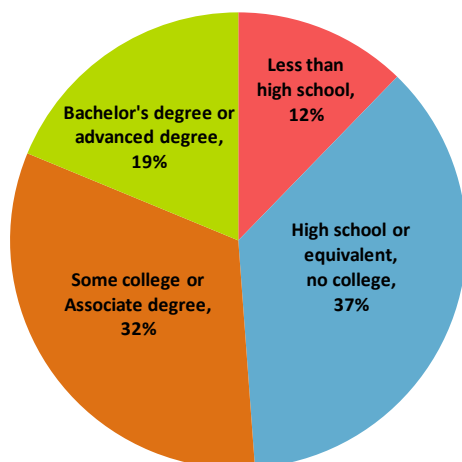


In 2015, 51.1 percent of the workforce was female and 48.9 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 6.5 percent was non-white, compared to 15.3 percent for the State; 2.0 percent of the Region's workforce was Hispanic or Latino, compared to 3.5 percent for Missouri.

For the Northeast Region, the primary language spoken at home is something other than English for 3.5 percent of the population age 18 to 64. That compares to 6.6 percent for Missouri and 22.0 percent for the US. The Northeast Region has a higher percentage of the population with a disability compared to the State and Nation. For the Northeast Region, 14.3 percent of the population has a disability compared to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the Northeast Region workforce are below that of the rest of Missouri for bachelor's and advanced degrees. In the Northeast Region, 88 percent of the population has a high school diploma or equivalent and 19 percent has a bachelor's or advanced degree. The Missouri workforce has an 88 percent rate with a high school diploma or equivalent and has 23 percent with a bachelor's or advanced degree.

**Educational Attainment
Northeast Region, 2015**



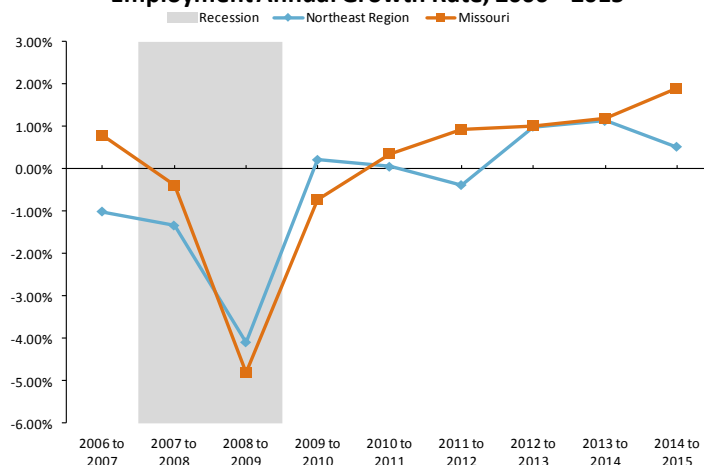
Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

INDUSTRY ANALYSIS

In the Northeast Region, employment levels dropped from 80,200 in 2006 to 75,100 in 2009. From 2009 to 2012, there was nearly a net zero job change in the Region. Positive job growth started again in 2012 with 2,000 new jobs added to the Region from 2012 to 2015. From 2011 to 2015, there was an annualized growth rate of 0.5 percent.

In 2015, the Region had a 0.5 percent growth in employment. That compared to 1.9 percent for the State. Growth in the Region matched the state average in 2013 and 2014.

Employment Annual Growth Rate, 2006 - 2015



Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Health Care and Social Assistance (representing 16.4 percent of employment), *Retail Trade* (14.3 percent) and *Manufacturing* (13.2 percent) are the three largest industries in the Region. *Manufacturing* employment trends help explain a great deal of employment trends in the Region. From before the recession in 2006 through 2009, manufacturing in the region lost 2,400 jobs. Since 2009, manufacturing has been growing, adding 1,193 jobs. From 2011 to 2015, manufacturing grew at an annualized 1.2 percent in the Region.

Largest Employers in Northeast Region

The Region's top employers are based in health care and advanced manufacturing. Top health care employers include **Hannibal Regional Hospital**, **Moberly Regional Medical Center** and the **North East Regional Medical Center**.

Top employing food manufacturers include **General Mills**, **Kraft Foods** and **Con Agra Foods**. **Cerro Flow** and **Bodine Aluminum** are major metal manufacturers. **Watlow Electric** is a major machinery manufacturer.

Truman State University is a large public sector employer in the Region.

Table 1: Northeast Region Top Industries by Employment, 2015					
Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Health Care and Social Assistance	12,290	12,625	335	0.5%	\$32,295
Retail Trade	10,797	11,029	232	0.4%	\$22,183
Manufacturing	9,562	10,137	575	1.2%	\$43,704
Accommodation and Food Services	6,448	6,788	339	1.0%	\$12,430
Educational Services	6,463	6,576	113	0.3%	\$33,240
Public Administration	5,243	5,126	(117)	-0.5%	\$31,103
Construction	4,272	4,357	84	0.4%	\$44,801
Transportation and Warehousing	3,461	3,449	(12)	-0.1%	\$41,334
Wholesale Trade	2,925	3,106	181	1.2%	\$45,292
Finance and Insurance	2,528	2,448	(80)	-0.6%	\$40,544

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Healthcare and Social Assistants grew in the Region over the last ten years with some year-to-year variability. It had an annualized growth rate of 0.7 percent from 2006 to 2015 and 0.5 percent from 2011 to 2015. *Retail Trade* declined in employment from 2006 and 2009 and has since had small net gains in employment, with some variability year-to-year. *Table 1* provides a list of the top ten industry sectors for the Region based on employment.

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. The Northeast Region has high concentrations in advanced manufacturing and *Nonstore Retailers* (see *Table 2*).

LABOR MARKET ANALYSIS

Unemployment

The unemployment rate in the Region has consistently fallen from its peak in 2010. The regional unemployment rate reached 12.4 percent in February of 2010. By the end

Table 2: Northeast Region Location Quotients		
Industry Sector	Employment	Location Quotient
Primary Metal Mfg	1,398	6.5
Nonstore Retailers	1,136	4.1
Gasoline Stations	1,857	3.7
Food Mfg	2,022	2.4
Heavy/Civil Engineering Constr	1,177	2.2
Nursing/Residential Care	3,440	1.9
Bldg Material /Garden Equip Dealers	1,216	1.8
Machinery Mfg	1,030	1.7
Truck Transportation	1,305	1.6
General Merchandise Stores	2,381	1.4
Credit Intermediation	1,867	1.3
Transportation Equipment Mfg	1,125	1.3
Merchant Wholesalers	1,393	1.2

Review of private businesses only.

Includes only employers with 1,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

of 2015, the unemployment rate fell to 4.0 percent. This mirrors state and national trends, with the Region consistently maintaining unemployment rates slightly above the state average.

Real-Time Labor Market Summary

Unemployment rates are dependent on overall economic health and aggregate demand within an economy, but it

is also impacted by the ability of the labor force to meet the demand for jobs within the region. To better understand the labor supply and demand within the region, a review was completed of the skills possessed by job seekers and comparing that to the online job ads in the region.

Table 3 provides a count of online job ads in 2015 for the Northeast Region and compares it to job seeker data for people who registered with jobs.mo.gov.

Top Ten Job Postings, 2015	
Occupation	Job Postings
Truck Drivers	1,230
Registered Nurses	739
Retail Salespersons	396
Customer Service Reps	281
First-Line Supervisors for Retail	222
LP and LV Nurses	191
Sales Reps, Wholesale/Mfg	189
Maintenance/Repair Workers	178
Freight/Stock Movers	155
Physical Therapists	148

Source: Burning Glass Technologies, Labor Insight

Table 3: Real Time Labor Market Analysis, Northeast Region 2015										
	Total	Health Care & Related	Business & Sales	Science & Technology	Other Services	Transportation	Food Service	Management & Support	*CIMR	Production
Number of Job Ads	7,166	2,117	1,253	395	452	565	278	1,303	477	326
% of Job Ads	100%	29.5%	17.5%	5.5%	6.3%	7.9%	3.9%	18.2%	6.7%	4.5%
Number of Jobseekers	5,955	546	490	164	392	501	361	1,547	1,025	929
% of Jobs Sought	100%	9.2%	8.2%	2.8%	6.6%	8.4%	6.1%	26.0%	17.2%	15.6%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

The Real Time Labor Market Analysis shows that *Health Care* and *Business/Sales* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage for workers in these industry sectors. There is an over supply of labor in *Construction/Maintenance* and *Production* related fields, especially for lower skilled job seekers.

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. Table 4 lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers*, *Freight and Material Movers*, and *Personal Care Aides* are project a high number of growth and replacement openings. Due to high turn-over rates, these occupations have more replacement openings relative to other occupations.

Skilled occupations with fewer replacement openings but high growth openings include *Nurses and General and Operations Managers*. Middle skilled jobs or jobs that require an associate's degree, technical degree or some post high school training other than a bachelor's degree showing growth in the Northeast Region include *Truck Drivers*, *Nursing Assistants* and *Cooks*.

Table 4: Northeast Region Long-Term Occupation Projections					
Occupation	2012 Estimated Employment	2022 Projected Employment	Growth Openings	Replacement Openings	Total Openings
Cashier	3,015	3,144	129	1,303	1,432
Food Prep/Serving	1,687	1,980	293	644	937
Waiter/Waitress	1,583	1,704	121	762	883
Retail Salesperson	2,040	2,220	180	698	878
Truck Drivers	1,877	2,193	316	300	616
Freight/Stock Mover	1,147	1,334	187	355	542
General/Ops Mngr	1,721	1,902	181	322	503
Cust Service Rep	1,131	1,312	181	308	489
Office Clerk	1,878	1,970	92	395	487
Admin Assistant	2,215	2,416	201	267	468

Source: MERIC Occupational Projections



Northwest Region

The Northwest Region is made up of 18 counties in the Northwest corner of Missouri. The Region is home to several major cities including, St. Joseph, Chillicothe, Trenton and Maryville.

Many of Missouri's major highways cross through this Region. Interstate 29 runs through the western part of the Region, while Interstate 35 crosses the middle. Highway 36 and Highway 136 run east/west. Highways 59, Highway 159, Highway 71, Highway 169, Highway 69 and Highway 65 run north/south.



WORKFORCE DEMOGRAPHICS

The Region is home to nearly 93,000 employees, making up four percent of Missouri's workforce. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

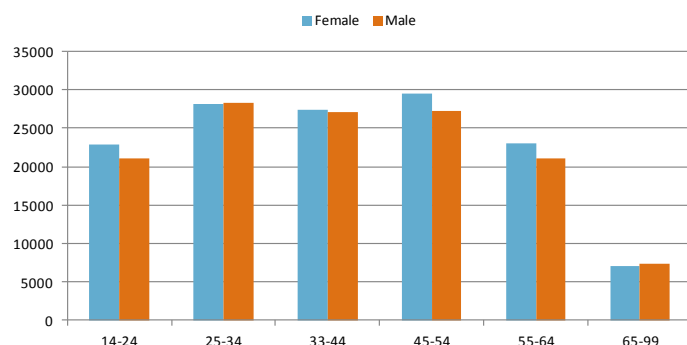
In the Region, 23 percent of the workforce is age 55 or older, slightly above the 22 percent for Missouri. The 55 and older age cohort increased six percent from 2006. The increasing age of the workforce mirrors a larger trend occurring in Missouri and the United States.

In 2015, 51.1 percent of the workforce was female and 48.9 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 6.8 percent of the workforce was non-white, compared to 15.3 percent for the State; 3.9 percent was Hispanic or Latino, compared to 3.5 percent for Missouri.

For the Northwest Region, the primary language spoken at home is something other than English for 4.6 of the population age 18 to 64. That compares to 6.6 percent for Missouri and 22.0 percent for the US. The Northwest Region has a higher percentage of the population with a disability compared to the State and Nation. For the Region, 13.1 percent of the population has a disability compared to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the Northwest Region workforce are below that of the rest of Missouri for bachelor's or advanced degrees. In the Northwest Region, 88 percent of the workforce has a high school

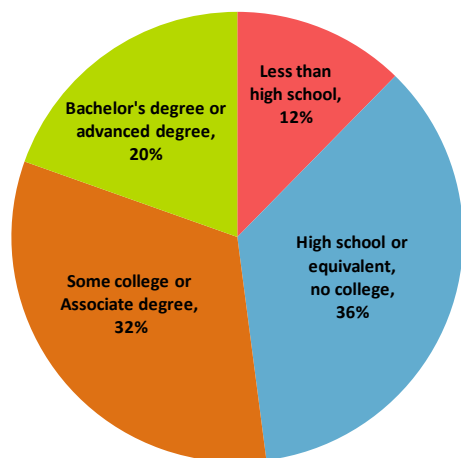
**Workforce Age Groups
Northwest Region, 2015**



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

diploma or equivalent and 20 percent has a bachelor's or advanced degree. The Missouri workforce has an 88 percent rate with a high school diploma or equivalent as well and has 23 percent with a bachelor's or advanced degree.

**Educational Attainment
Northwest Region, 2015**



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

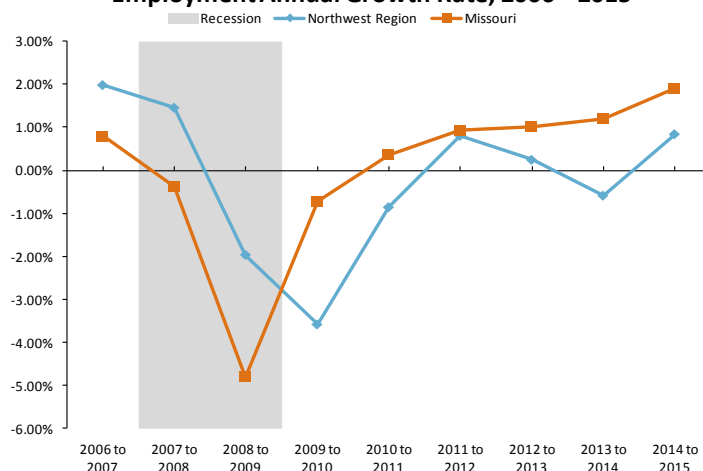
INDUSTRY ANALYSIS

The Northwest Region lost over 6,000 jobs from 2008 to 2011. Employment bottomed out for the Region at about 91,600. From 2011 to 2015, 1,177 new jobs were added to the Region with an annualized growth rate of 0.3 percent.

In 2015, the Region had a 0.8 percent growth in employment. That compared to 1.9 percent for the State. The Region had lower levels of employment decline during the recession, but has followed that with lower annual growth rates during the economic recovery (see *Employment Annualized Growth Rate* graph).

Manufacturing and *Health Care and Social Assistants* are the two largest industries in the Region, each representing nearly 17 percent of employment. *Manufacturing* lost over 2,100 jobs from 2008 to 2010.

Employment Annual Growth Rate, 2006 - 2015



Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Manufacturing grew from 2010 through 2015, adding 826 jobs. From 2011 to 2015, it grew an annualized 0.8 percent. *Health Care and Social Assistance*, with some variability year-to-year, has grown over the past decade, adding over 1,600 jobs. From 2011 to 2015, it had an annualized growth rate of 1.0 percent.

Other growing sectors from 2011 to 2015 include *Wholesale Trade* and *Professional, Scientific, and Technical Services*. Table 1 provides a list of the top ten industry sectors for the region based on employment.

Largest Employers in Northwest Region

The Region's top employers are in health care and advanced manufacturing. The top health care employer is the **Heartland Regional Medical Center**.

Boehringer Ingelheim is a major employer in chemical manufacturing. Top employing food manufacturers include **Triumph Foods**, **Smithfield Farmland**, and **Hillshire Brands**. **Kawasaki Motors** is a major machinery manufacturer, and **Altec Industries** is a large fabricated metals manufacturer.

Northwest Missouri State University is a major public employer in the Region.

Table 1: Northwest Region Top Industries by Employment, 2015					
Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Manufacturing	14,963	15,557	593	0.8%	\$49,573
Health Care and Social Assistance	14,599	15,314	715	1.0%	\$38,746
Retail Trade	12,196	12,199	3	0.0%	\$22,769
Educational Services	6,845	7,096	250	0.7%	\$30,696
Accommodation and Food Services	7,118	6,977	(141)	-0.4%	\$13,375
Public Administration	6,879	6,473	(406)	-1.2%	\$33,450
Construction	3,965	4,066	101	0.5%	\$49,517
Administrative and Support Services	3,085	3,988	903	5.3%	\$24,285
Wholesale Trade	3,280	3,431	151	0.9%	\$44,706
Finance and Insurance	3,246	3,143	(103)	-0.6%	\$47,839

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. The Northwest Region has high concentrations in advanced manufacturing.

Table 2: Northwest Region Location Quotients		
Industry Sector	Employment	Location Quotient
Food Mfg	5,978	5.8
Chemical Mfg	1,874	3.5
Gasoline Stations	1,777	2.9
Fabricated Metal Product Mfg	2,598	2.7
Machinery Mfg	1,564	2.1
Nursing/Residential Care	4,098	1.9
Building Material/Garden Equip Dealers	1,390	1.7
General Merchandise Stores	2,967	1.4
Merchant Wholesalers	1,778	1.3

Review of private businesses only.

Includes only employers with 1,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

LABOR MARKET ANALYSIS

Unemployment

The unemployment rate in the Region has consistently fallen from its peak in 2010. The regional unemployment rate reached 9.8 percent in February of 2010. By the end of 2015, the unemployment rate fell to 3.6 percent. This mirrors state and national trends, with the Region consistently maintaining unemployment levels below the State and Nation.

Real-Time Labor Market Summary

Unemployment rates are dependent on overall economic health and aggregate demand within an economy, but it is also impacted by the ability of the labor force to meet the demand for jobs within the region. To better understand the labor supply and demand within the region, a review was completed of the skills possessed by job seekers and comparing that to online job ads.

Table 3 provides a count of job ads in 2015 for the Northwest Region and compares it to job seeker data for people who registered with jobs.mo.gov.

The Real Time Labor Market Analysis shows that *Health Care*, *Business/Sales*, and *Transportation* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage for workers in these industry sectors. There also may be an oversupply in the areas of *Construction/Maintenance* and *Production* related fields, especially for lower skilled job seekers.

Top Ten Job Postings, 2015	
Occupation	Job Postings
Truck Drivers	1,893
Registered Nurses	890
Retail Salespersons	602
Diesel Engine Mechanic	444
Customer Service Reps	395
Sales Reps, Wholesale/Mfg	369
First-Line Supervisors for Retail	314
Freight/Stock Movers	211
Maintenance/Repair Workers	210
Speech Pathologists	207

Source: Burning Glass Technologies, Labor Insight

Table 3: Real Time Labor Market Analysis, Northwest Region 2015										
	Total	Health Care & Related	Business & Sales	Transportation	Science & Technology	Other Services	Food Service	Management & Support	*CIMR	Production
Number of Job Ads	10,861	2,518	1,718	1,545	653	759	414	1,887	895	472
% of Job Ads	100%	23.2%	15.8%	14.2%	6.0%	7.0%	3.8%	17.4%	8.2%	4.3%
Number of Jobseekers	6,097	541	550	562	161	398	366	1,530	976	1,014
% of Jobs Sought	100%	8.9%	9.0%	9.2%	2.6%	6.5%	6.0%	25.1%	16.0%	16.6%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. *Table 4* lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers* and *Customer Service Representatives*, are project high growth and replacement openings. Due to high turn-over rates, these occupations have more replacement openings relative to other occupations.

Skilled occupations that have fewer replacement openings but project a high amount of growth openings include *Nurses and General and Operations Managers*. Middle skilled jobs or jobs that require an associate's degree, technical degree or some post high school training other than a bachelor's degree that are showing growth in the Northwest Region include *Truck Drivers* and *Nursing Assistants*.

Table 4: Northwest Region Long-Term Occupation Projections					
Occupation	2012 Estimated Employ- ment	2022 Projected Employ- ment	Growth Openings	Replace- ment Openings	Total Openings
Food Prep/Serving	3,144	3,587	443	1,200	1,643
Cashier	2,942	3,031	89	1,272	1,361
Retail Salesperson	2,659	2,847	188	909	1,097
Waiter/Waitress	1,683	1,751	68	810	878
Freight/Stock Mover	1,568	1,758	190	486	676
Cust Service Rep	1,337	1,630	293	364	657
Registered Nurse	1,940	2,183	243	376	619
Nursing Assistant	1,989	2,174	185	378	563
Office Clerks	2,124	2,194	70	446	516
Admin Assistant	2,230	2,475	245	268	513

Source: MERIC Occupational Projections



Ozark Region

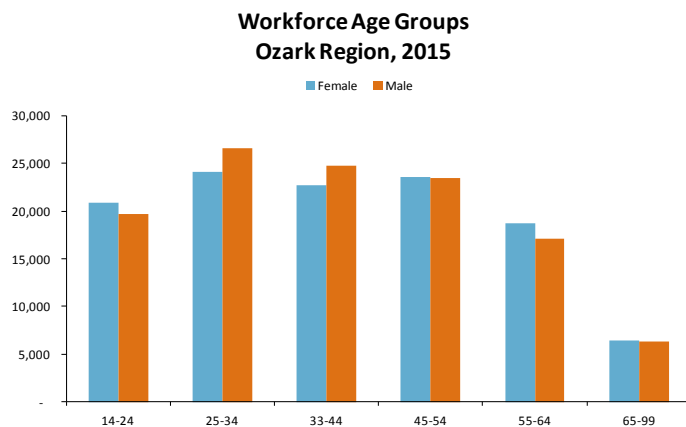
The Ozark Region is composed of seven counties in Southwest Missouri. This Region is home to several major cities including Springfield and Branson.

Many of Missouri's major highways cross through this Region. Interstate 44 runs through the center of the Region. In addition, Highway 60 and Highway 160 cross east/west through the Region while Highway 65 runs north/south.

WORKFORCE DEMOGRAPHICS

The Region is home to over 228,000 employees who make up nine percent of Missouri's workforce. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

In the Ozark Region, 21 percent of the workforce is age 55 or older, which is slightly below the 22 percent for Missouri. The 55 and older age cohort increased four percent since 2006. The increasing age of the workforce mirrors a larger trend that is occurring in Missouri and the United States.



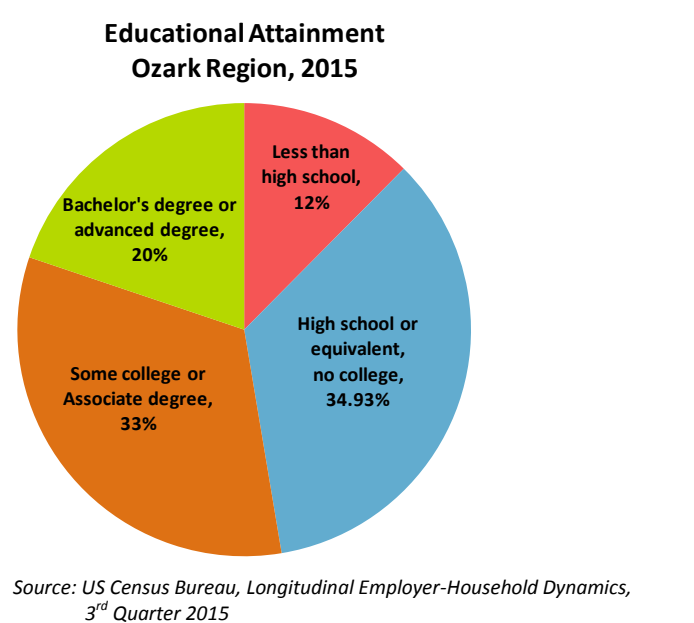
Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015



In 2015, 49.7 percent of the workforce was female and 50.3 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 6.9 percent of the workforce was non-white, compared to 15.3 percent for the State; 3.2 percent was Hispanic or Latino, compared to 3.5 percent for Missouri.

For the Ozark Region, the primary language spoken at home is something other than English for 5.1 percent of the population age 18 to 64. That compares to 6.6 percent for Missouri and 22.0 percent for the US. In the Region, 12.5 percent of the population, age 18 to 64, has a disability. That compares to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

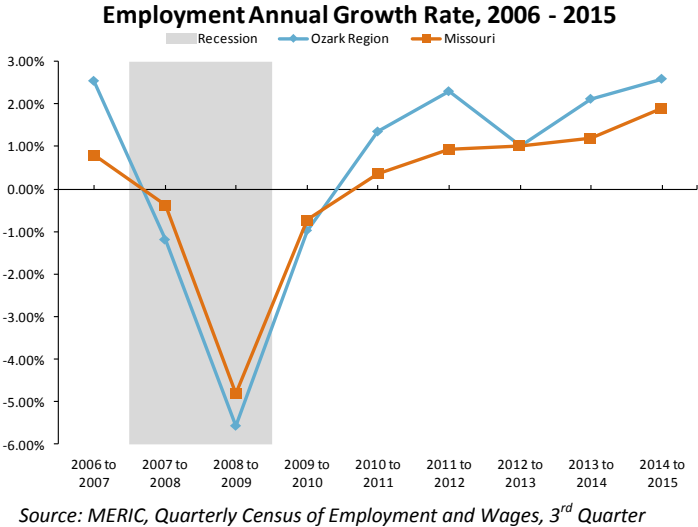
Educational attainment rates for the Ozark Region workforce are below that of the rest of Missouri for bachelor's and advanced degrees. In the Ozark Region, 88 percent of the workforce has a high school diploma or equivalent and 20 percent has a bachelor's or advanced degree. The Missouri workforce has an 88 percent rate with a high school diploma or equivalent and has 23 percent with a bachelor's or advanced degree.



INDUSTRY ANALYSIS

The Ozark Region lost over 17,000 jobs from 2007 to 2010, with employment levels dropping to nearly 208,000. Since 2010, over 20,000 new jobs have been added to the Region. From 2011 to 2015, the Region had an annualized growth rate of 1.6 percent. 2015 marks the first year where employment levels surpassed pre-recession levels for the Region.

In 2015, the Ozark Region had a 2.6 percent growth in employment. That compared to 1.9 percent for the State. Outside of the recession years, the Region had higher employment growth rates than the rest of Missouri.



The three largest employing industry sectors in the region are *Health Care and Social Assistance* (accounting for 17 percent of all employment), *Retail Trade* (14 percent) and *Accommodation and Food Services* (13 percent). From 2006 to 2015, the *Health Care and Social Assistance* sector added jobs every year, totaling 6,717 over the ten years. It has maintained high growth rates, throughout those ten years.

Largest Employers in Ozark Region

Top employers in the area are in a variety of industry sectors. Top Health Care employers include **Mercy Hospital Springfield**, **CoxHealth** and **Citizens Memorial Hospital**.

New Prime, Inc. is a major employer within truck transportation. **Kraft Foods** and **Loren Cook** are major manufacturers. There are call centers for **Chase Bank Cardservices**, **Hotels.com** and **T-Mobile**. **Bass Pro Shops** and **O'Reilly Automotive** have their corporate headquarters in the Region.

Missouri State University is a major public sector employer in the Region.

Table 1: Ozark Region Top Industries by Employment, 2015

Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Health Care and Social Assistance	36,582	39,375	2,793	1.5%	\$45,494
Retail Trade	29,691	31,094	1,403	0.9%	\$26,248
Accommodation and Food Services	26,415	29,105	2,689	2.0%	\$17,899
Manufacturing	14,343	15,370	1,027	1.4%	\$44,080
Educational Services	14,029	14,060	31	0.0%	\$34,352
Administrative and Support Services	12,419	13,906	1,487	2.3%	\$28,542
Transportation and Warehousing	9,377	12,424	3,047	5.8%	\$42,830
Construction	9,467	10,390	923	1.9%	\$41,619
Wholesale Trade	9,642	10,333	691	1.4%	\$45,975
Finance and Insurance	8,725	8,694	(31)	-0.1%	\$46,992

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Retail Trade and *Accommodation and Food Services* had considerable job decline during the recession, both losing over 1,800 jobs and both having annualized decline of over two percent between 2007 and 2009. Since that time, both industry sectors have rebounded. *Retail Trade* added 1,785 jobs from 2009 to 2015, growing at an annualized 0.9 percent rate from 2011 to 2015. *Accommodations and Food Service* added 3,135 jobs from 2009 to 2015, with an annualized growth rate of two percent from 2011 to 2015.

Other sectors contributing to the employment growth in the Region are *Transportation and Warehousing* and *Professional, Scientific and Technical Services*. *Transportation and Warehousing* added over 3,000 jobs from 2011 through 2015 and *Professional, Scientific and Technical Services* added nearly 2,500. Table 1 provides a list of the top ten industry sectors for the Region based on employment.

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how

concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. The Ozark Region has high concentrations in *Truck Transportation* and in industry sectors related to tourism, such as *Performing Arts, Accommodations* and *Retailers*.

Table 2: Ozark Region Location Quotients

Industry Sector	Employment	Location Quotient
Truck Transport	6,960	2.9
Performing Arts/Spectator Sports	1,917	2.5
Accommodation	7,069	2.1
Nonstore Retailers	1,708	2.1
Telecommunications	2,512	1.9
Hospitals	14,911	1.9
Sport/Hobby/Musical/Book Stores	1,819	1.8
Misc Store Retailers	2,068	1.5
Gasoline Stations	2,259	1.5
General Merchandise Stores	7,338	1.4
Rental/Leasing Services	1,264	1.4
Nursing/Residential Care	7,066	1.3

Review of private businesses only.

Includes only employers with 1,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

LABOR MARKET ANALYSIS

Unemployment

The unemployment rate in the Region has consistently fallen from its peak in 2010. The regional unemployment rate reached 11.7 percent in February of 2010. By the end of 2015, the unemployment rate fell to 3.7 percent. This mirrors state and national trends.

Real-Time Labor Market Summary

Unemployment rates and are dependent on overall economic health and aggregate demand within an economy, but it is also impacted by the ability of the labor force to meet the demand for jobs within the region. To better understand the labor supply and demand within the region, a review was completed of the skills possessed by job seekers and comparing that to the online job ads in the region.

Table 3 provides a count of job ads in 2015 for the Ozark Region and compares it to job seeker data for people who registered with jobs.mo.gov.

The Real Time Labor Market Analysis shows that *Health Care* and *Business/Sales* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage for workers in these industry sectors. There also may be an oversupply in the areas of *Construction/Maintenance*, *Management/Support* and *Production* related fields, especially for lower skilled job seekers.

Top Ten Job Postings, 2015	
Occupation	Job Postings
Truck Drivers	2,079
Retail Salespersons	1734
Registered Nurses	1363
Sales Reps, Wholesale/Mfg	1157
Customer Service Reps	904
First-Line Supervisors for Retail	849
Computer Occupations	522
Maintenance/Repair Workers	490
Secretaries and Admin Assistants	487
Managers	457

Source: Burning Glass Technologies, Labor Insight

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. The Table 4 lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers*, *Customer Service Representatives* and *Freight and Stock Movers* project a high number of growth and replacement openings. Due to high turn-over rates, these occupations have more replacement openings relative to other occupations.

Skilled occupations that have fewer replacement openings but high growth openings include *Registered Nurses*, *General and Operations Managers*, *Accountants and Auditors* and *Financial Advisors*. Middle skilled jobs or jobs that require an associate's degree, technical

Table 3: Real Time Labor Market Analysis, Ozark Region 2015										
	Total	Health Care & Related	Business & Sales	Science & Technology	Transportation	Other Services	Food Service	*CIMR	Management & Support	Production
Number of Job Ads	28,432	5,222	5,977	2,820	2,604	1,885	1,371	1,918	5,860	775
% of Job Ads	100%	18.4%	21.0%	9.9%	9.2%	6.6%	4.8%	6.7%	20.6%	2.7%
Number of Jobseekers	16,103	1,266	1,801	447	1,320	1,066	1,189	2,436	4,724	1,853
% of Jobs Sought	100%	7.9%	11.2%	2.8%	8.2%	6.6%	7.4%	15.1%	29.3%	11.5%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

degree or some post high school training other than a bachelor's degree showing growth in the Ozark Region include *Truck Drivers*, *Carpenters* and *Nursing Assistants*.

Table 4: Ozark Region Top Ten Long-Term Occupation Projections by Total Openings					
Occupation	2012 Estimated Employ- ment	2022 Projected Employ- ment	Growth Growth Openings	Replace- ment Openings	Total Openings
Food Prep/Serving	7,384	8,267	883	2,819	3,702
Retail Salesperson	8,727	9,216	489	2,985	3,474
Cashier	6,526	6,573	47	2,821	2,868
Waiter/Waitress	5,196	5,332	136	2,500	2,636
Cust Service Rep	4,284	5,157	873	1,166	2,039
Registered Nurse	5,515	6,159	644	1,069	1,713
Freight/Stock Mover	3,699	4,197	498	1,146	1,644
Truck Driver	5,487	6,249	762	878	1,640
Office Clerk	6,034	6,340	306	1,268	1,574
General/Ops Mngr	4,155	4,605	450	777	1,227

Source: MERIC Occupational Projections



South Central Region

The South Central Region consists of 12 counties in the center of the southern portion of Missouri. This Region is home to several major cities including West Plains and Poplar Bluff.

Many of Missouri's major highways cross through this Region. Highway 60 and Highway 160 run east/west through the Region, and Highway 63 and Highway 67 cross north/south



WORKFORCE DEMOGRAPHICS

The South Central Region is home to over 58,700 employees who make up six percent of Missouri's workforce. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

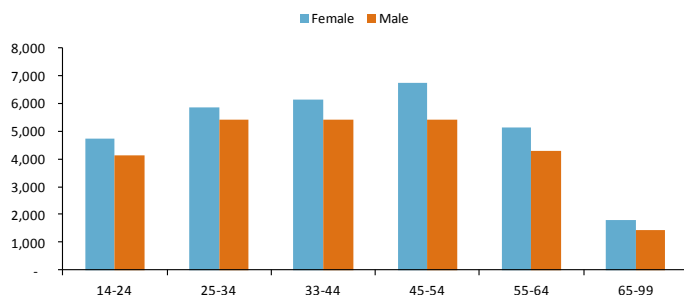
In the South Central Region and in Missouri, 22 percent of the workforce is age 55 or older. In the Region, the 55 and older age cohort increased 6 percent since 2006. The increasing age of the workforce mirrors a larger trend that is occurring in Missouri and the United States.

in 2015, 53.8 percent of the workforce was female and 46.2 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 5.5 percent of the workforce was non-white, compared to 15.3 percent for the State; 2.1 percent was Hispanic or Latino, compared to 3.5 percent for Missouri.

For the South Central Region, the primary language spoken at home is something other than English for 2.2 percent of the population age 18 to 64. That compares to 6.6 percent for Missouri and 22.0 percent for the US. The South Central Region has a higher percentage of the population with a disability compared to the State and Nation. For the South Central Region, 20.6 percent of the population has a disability compared to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the South Central Region workforce are below that of Missouri. In the South Central Region, 87 percent of the workforce has a high school diploma or equivalent and 16 percent has a bachelor's or advanced degree. The Missouri workforce

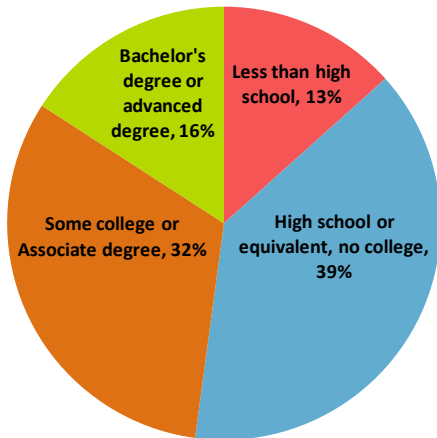
**Workforce Age Groups
South Central Region, 2015**



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

has an 88 percent rate with a high school diploma or equivalent and has 23 percent with a bachelor's or advanced degree.

**Educational Attainment
South Central Region, 2015**



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

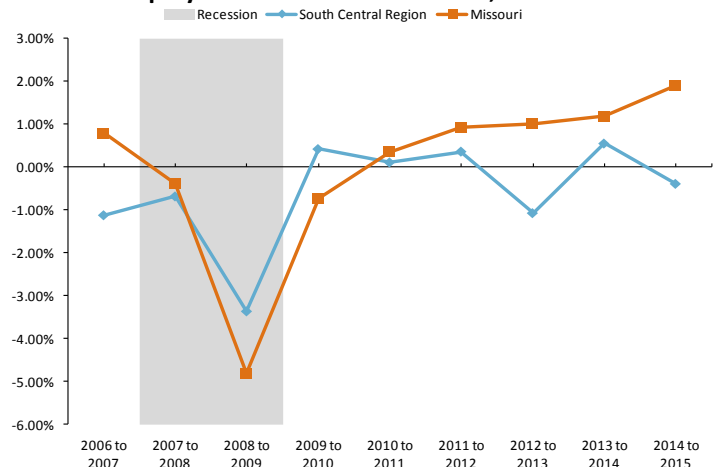
INDUSTRY ANALYSIS

From 2006 to 2015, the South Central Region annual growth rate was -0.05 percent, with negative growth rates in five of the last ten years. From 2011 through 2015, the Region's annualized growth rate was -0.1 percent. Missouri had an annualized growth rate of 1.0 percent over that time.

In 2015, the Region had a -0.4 percent growth in employment. That compared to 1.9 percent for the State. The South Central Region employment has remained at recession levels throughout the national economic recovery.

Much of the explanation of the limited job growth in the Region is tied to the *Manufacturing* sector. Before the recession, *Manufacturing* was the largest employer in the Region but has since fallen to number two. In 2015, it accounted for 15 percent of employment. From 2006 to 2015, manufacturing lost over 3,600 jobs with 1,200 of the manufacturing jobs lost from 2011 to 2015. *Health*

Employment Annual Growth Rate, 2006 - 2015



Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Care and Social Assistance surpassed *Manufacturing* as the top employer in the Region over the past decade. In 2015, it accounted for 22 percent of employment in the Region. It grew an annualized 2 percent from 2006 to 2015 and 2.4 percent from 2011 to 2015.

Retail Trade is also a large employer in the Region, accounting for 15 percent of all employment. Retail trade declined during the recession but has since started to grow, showing an annualized growth of 0.7 percent from 2011 to 2015. Other industry sectors that grew from 2011 through 2015 include *Administrative and Support Services*, *Wholesale Trade* and *Professional, Scientific, and Technical Services*. Table 1 provides a list of the top ten industry sectors for the region based on employment.

Largest Employers in Northwest Region

Top employers in the Region are in *Health Care* and *Manufacturing*. **Poplar Bluff Regional Medical Center**, the **Ozarks Medical Center** and the **Pershing VA Medical Center** are all large health care employers in the Region.

Major manufactures include **Briggs and Stratton**, **Scroll Compressors**, **Libla Industries** and the **Gates Corporation**.

Table 1: South Central Region Top Industries by Employment, 2015

Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Health Care and Social Assistance	11,316	12,724	1,408	2.4%	\$29,758
Manufacturing	10,005	8,771	(1,234)	-2.6%	\$32,784
Retail Trade	8,450	8,759	309	0.7%	\$22,938
Accommodation and Food Services	4,887	5,020	133	0.5%	\$12,450
Educational Services	4,009	4,064	55	0.3%	\$27,843
Public Administration	3,622	3,620	(2)	0.0%	\$33,128
Administrative and Support Services	1,824	2,096	272	2.8%	\$17,621
Transportation and Warehousing	2,053	1,979	(75)	-0.7%	\$36,944
Construction	1,960	1,887	(73)	-0.8%	\$37,317
Wholesale Trade	1,677	1,869	192	2.2%	\$33,741

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. The Region has high concentrations in advanced manufacturing, especially in *Wood Product Manufacturing* and *Machinery Manufacturing*.

Table 2: South Central Region Location Quotients

Industry Sector	Employment	Location Quotient
Wood Product Mfg	1,925	11.9
Machinery Mfg	1,743	3.7
Gasoline Stations	1,255	3.3
Social Assistance	3,275	2.3
Nursing/Residential Care	2,866	2.1
General Merchandise Stores	2,312	1.7
Truck Transportation	1,028	1.7
Motor Vehicle/Parts Dealers	1,110	1.4
Credit Intermediation	1,397	1.3
Food/Beverage Stores	1,640	1.3

Review of private businesses only.

Includes only employers with 1,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

LABOR MARKET ANALYSIS

Unemployment

The unemployment rate in the Region has consistently fallen from its peak in 2010. The regional unemployment rate reached 12.5 percent in February of 2010. By the end of 2015, the unemployment rate fell to 5.6 percent. This mirrors state and national trends, with the regional unemployment rate consistently staying above state and national unemployment rates.

Real-Time Labor Market Summary

Unemployment rates are dependent on overall economic health and aggregate demand within an economy, but it is also impacted by the ability of the labor force to meet the demand for jobs within the region. To better understand the labor supply and demand within the region, a review was completed of the skills possessed by job seekers and comparing that to the online job ads.

Table 3 provides a count of online job ads in 2015 for the South Central Region and compares it to job seeker data for people who registered with jobs.mo.gov.

Table 3: Real Time Labor Market Analysis, South Central Region 2015										
	Total	Health Care & Related	Business & Sales	Science & Technology	Other Services	Food Service	Transportation	Management & Support	*CIMR	Production
Number of Job Ads	5,036	1,820	907	245	309	211	245	845	289	165
% of Job Ads	100%	36.1%	18.0%	4.9%	6.1%	4.2%	4.9%	16.8%	5.7%	3.3%
Number of Jobseekers	6,393	610	589	121	423	405	561	1,667	1,020	998
% of Jobs Sought	100%	9.5%	9.2%	1.9%	6.6%	6.3%	8.8%	26.1%	15.9%	15.6%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

The Real Time Labor Market Analysis shows that *Health Care* and *Business/Sales* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage for workers in these industry sectors. This analysis shows an oversupply in the areas of *Construction/Maintenance* and *Production* related fields, especially for lower skilled job seekers.

Top Ten Real-Time Labor Demand Occupations by Online Job Ads	
Occupation	Job Postings
Truck Drivers	750
Registered Nurses	551
Retail Salespersons	323
Customer Service Reps	223
Sales Reps, Wholesale/Mfg	187
First-Line Supervisors for Retail	180
LP and LV Nurses	168
Nursing Assistants	142
Physicians and Surgeons	136
Freight/Stock Movers	112

Source: Burning Glass Technologies, Labor Insight

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. *Table 4* lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers*, *Stock and Materials Movers*, *Personal Care Aides* and *Team Assemblers* project high growth and replacement openings. Due to high turn-over

rates, these occupations have more replacement openings relative to other occupations.

Skilled occupations that have fewer replacement openings but high growth rates include *Registered Nurses*, *Teachers*, and *General and Operations Managers*. Middle skilled jobs or jobs that require an associate's degree, technical degree or some post high school training other than a bachelor's degree showing growth in the South Central Region include medical professions such as *Licensed Practical Nurses* and *Licensed Vocational Nurses and Nursing Assistants*. *Truck Drivers* is another middle skill occupation with high projected growth openings.

Table 4: South Central Region Occupation Projections					
Occupation	2012 Estimated Employ- ment	2022 Projected Employ- ment	Growth Openings	Replace- ment Openings	Total Openings
Cashier	2,651	2,755	104	1,146	1,250
Food Prep/Serving	1,776	2,039	263	678	941
Freight/Stock Mover	1,992	2,251	259	617	876
Registered Nurse	1,880	2,137	257	364	621
Retail Salesperson	1,419	1,531	112	485	597
Personal Care Aide	1,998	2,421	423	143	566
Waiter/Waitress	784	822	38	377	415
Office Clerk	1,499	1,588	89	315	404
Team Assembler	1,251	1,454	203	198	401
Truck Driver	1,323	1,511	188	212	400

Source: MERIC Occupational Projections



Southeast Region

The Southeast Region consists of 13 counties in the southeast portion of Missouri. This Region is home to several major cities including, Cape Girardeau, Sikeston, Caruthersville and Park Hills.

Many of Missouri's major highways cross through the Region. Interstate 55 runs north/south through the eastern part of the Region, while Interstate 57 travels east/west through the central part. In addition, Highway 60, Highway 61, Highway 62, Highway 67 and Highway 412 cross through the Region.

WORKFORCE DEMOGRAPHICS

The Southeast Region has a workforce of nearly 138,000 employees who make up five percent of Missouri's workforce. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

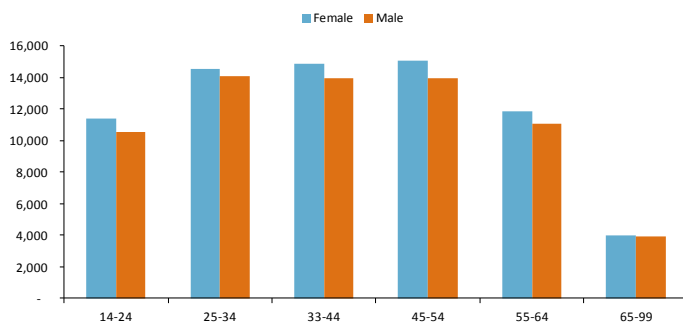
In the Southeast Region and Missouri, 22 percent of the workforce is age 55 or older. The 55 and older age cohort increased five percent from 2006 in the Region. The increasing age of the workforce mirrors a larger trend occurring in Missouri and the United States.



In 2015, 51.5 percent of the workforce was female and 48.5 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 10.3 percent of the workforce was non-white, compared to 15.3 percent for the State; 2.1 percent was Hispanic or Latino, compared to 3.5 percent for Missouri.

For the Southeast Region, the primary language spoken at home is something other than English for 2.6 percent of the population age 18 to 64. That compares to 6.6 percent for Missouri and 22.0 percent for the US. The Southeast Region has a higher percentage of the population with a disability compared to the State and Nation. For the Region, 17.9 percent of the population has a disability compared to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face

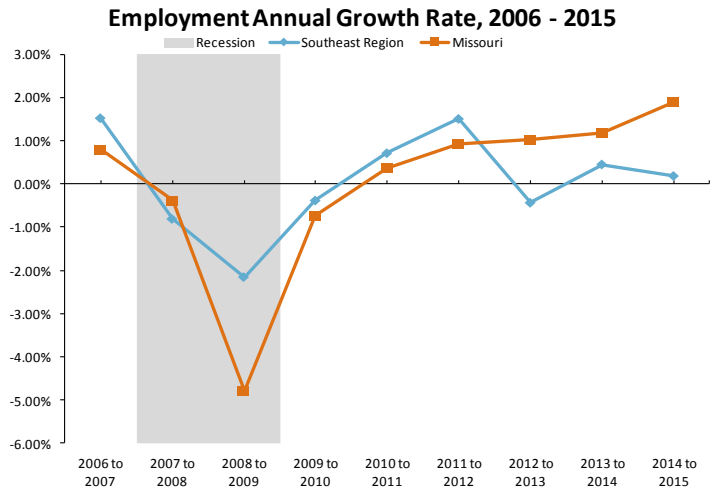
**Workforce Age Groups
Southeast Region, 2015**



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

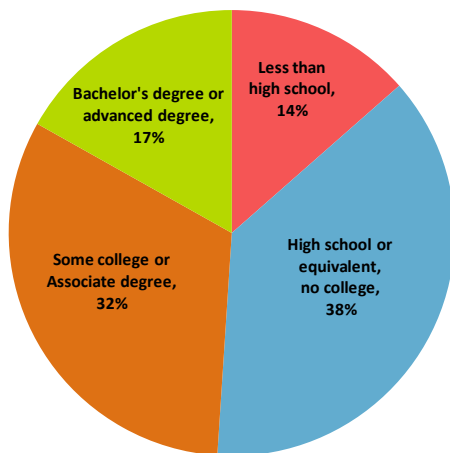
barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the Southeast Region workforce are below that of the rest of Missouri. In the Southeast Region, 87 percent of the population has a high school diploma or equivalent and 17 percent has a bachelor's or advanced degree. The Missouri workforce has an 88 percent rate with a high school diploma or equivalent and has 23 percent with a bachelor's or advanced degree.



Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Educational Attainment
Southeast Region, 2015



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

INDUSTRY ANALYSIS

In 2007, employment levels for the Southeast Region were above 139,300; by 2010, they dropped below 134,800. From 2011 to 2015, employment levels grew an annualized 0.3 percent. The Region added 2,314 jobs over that span, with much of that growth occurring from 2011 to 2012.

In 2015, the Region had a 0.2 percent growth in employment. That compared to 1.9 percent for the State. The Region had lower rates of annual growth than Missouri over the past three years.

Health Care and Social Assistance, Manufacturing, and Retail Trade are the three largest employers in the Region. *Health Care and Social Assistance* represents 22 percent of employment in the Region, adding 2,625 jobs from 2011 to 2015. It had declining employment for the Region in 2014 and 2015.

Largest Employers in Southeast Region

The Region's top employers are based in health care and advanced manufacturing. Top health care employers include **St. Francis Medical**, **Southeast Missouri Hospital** and **Missouri Delta Medical Center**.

Top employing food manufacturers include **Unilever Manufacturing**, **Tyson Chicken**, and **Gilster-Mary Lee**. Major transportation manufacturers include **Trinity Marine Products** and **Faurecia Emissions**. **Proctor & Gamble** and **W.W. Wood Products** also are major manufacturing employers. **Doe Run Resources** is a major mining employer in the Region.

Southeast Missouri State University is a large public sector employer in the Region.

Table 1: Southeast Region Top Industries by Employment, 2015

Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Health Care and Social Assistance	27,493	30,118	2,625	1.8%	\$33,165
Manufacturing	18,638	19,078	440	0.5%	\$43,773
Retail Trade	17,677	18,384	707	0.8%	\$24,001
Accommodation and Food Services	10,211	10,905	695	1.3%	\$13,902
Educational Services	7,982	8,055	73	0.2%	\$33,819
Public Administration	7,219	7,055	(164)	-0.5%	\$31,256
Construction	6,080	6,487	407	1.3%	\$42,730
Transportation and Warehousing	5,570	6,132	562	1.9%	\$44,605
Wholesale Trade	5,665	5,957	293	1.0%	\$42,144
Administrative and Support Services	5,071	4,488	(583)	-2.4%	\$27,113

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Manufacturing, which represents 14 percent of regional employment, lost over 4,000 jobs from 2006 to 2009. From 2009 to 2015, over 1,000 manufacturing jobs were added to the Region. *Retail Trade* declined in employment from 2007 and 2010 and has since gained in employment each year. *Table 1* provides a list of the top ten industry sectors for the Region based on employment.

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. The Southeast Region has high concentrations in *Mining* and advanced manufacturing (see *Table 2*).

LABOR MARKET ANALYSIS

Unemployment

The unemployment rate in the Region has consistently fallen from its peak in 2010. The regional unemployment rate reached 11.2 percent in February of 2010. By the end of 2015, the unemployment rate fell to 4.7 percent. This mirrors state and national trends, with the Region

Table 2: Southeast Region Location Quotients		
Industry Sector	Employment	Location Quotient
Mining	1,391	7.0
Plastics and Rubber Products Mfg	2,477	3.6
Paper Mfg	N/A	3.5
Crop Production	2,125	3.4
Wood Product Mfg	1,130	3.0
Furniture and Related Product Mfg	N/A	2.9
Gasoline Stations	2,561	2.8
Nonmetallic Mineral Product Mfg	1,086	2.7
Social Assistance	8,219	2.4
Food Mfg	3,353	2.2
Truck Transportation	2,799	1.9
Nursing/Residential Care	5,637	1.7
General Merchandise Stores	4,429	1.4
Transportation Equipment Mfg	2,177	1.4

Review of private businesses only.

Includes only employers with 1,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

consistently maintaining unemployment rates slightly above the state average.

Real-Time Labor Market Summary

Unemployment rates are dependent on overall economic health and aggregate demand within an economy, but it is also impacted by the ability of the labor force to meet the demand for jobs within the region. To better

understand the labor supply and demand within the region, a review was completed of the skills possessed by job seekers and comparing that to the online job ads.

Table 3 provides a count of online job ads in 2015 for the Southeast Region and compares it to job seeker data for people who registered with jobs.mo.gov.

The Real Time Labor Market Analysis shows that *Business/Sales* and *Health Care* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage for workers in these industry sectors. There may be an oversupply in the areas of *Construction/Maintenance* and *Production* related fields, especially for lower skilled job seekers.

Top Ten Job Postings, 2015	
Occupation	Job Postings
Truck Drivers	1,913
Registered Nurses	842
Retail Salespersons	839
First-Line Supervisors for Retail	501
Customer Service Reps	380
Sales Reps, Wholesale/Mfg	327
Nursing Assistants	301
Freight/Stock Movers	229
Maintenance/Repair Workers	226
First-Line Supervisors for Food Prep/Serving	225

Source: Burning Glass Technologies, Labor Insight

Table 3: Real Time Labor Market Analysis, Southeast Region 2015										
	Total	Business & Sales	Health Care & Related	Science & Technology	Transportation	Food Service	Other Services	Management & Support	*CIMR	Production
Number of Job Ads	10,581	2,484	2,515	487	972	616	500	1,780	820	407
% of Job Ads	100%	23.5%	23.8%	4.6%	9.2%	5.8%	4.7%	16.8%	7.7%	3.8%
Number of Jobseekers	12,366	1,113	1,248	225	1,205	894	820	2,919	1,886	2,056
% of Jobs Sought	100%	9.0%	10.1%	1.8%	9.7%	7.2%	6.6%	23.6%	15.2%	16.6%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. Table 4 lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers*, *Personal Care Aides*, and *Customer Service Representatives*, project high growth and replacement openings. Due to high turn-over rates, these occupations have more replacement openings relative to other occupations.

Skilled occupations that have fewer replacement openings but high growth openings include *Registered Nurses*, *General and Operations Managers*, *Elementary School Teachers* and *Accountants and Auditors*. Middle skilled jobs or jobs that require an associate's degree,

technical degree or some post high school training other than a bachelor's degree showing growth in the Southeast Region include *Truck Drivers*, *Nursing Assistants* and *Carpenters*.

Table 4: Southeast Region Top Ten Long-Term Occupation Projections by Total Openings					
Occupation	2012 Estimated Employ- ment	2022 Projected Employ- ment	Growth Openings	Replace- ment Openings	Total Total Openings
Cashier	4,953	5,100	147	2,141	2,288
Food Prep/Serving	3,172	3,636	464	1,211	1,675
Personal Care Aide	4,836	6,013	1,177	346	1,523
Retail Salesperson	3,676	3,919	243	1,257	1,500
Waiter/Waitress	2,437	2,555	118	1,172	1,290
Registered Nurse	4,112	4,527	415	797	1,212
Truck Drivers	3,581	4,083	502	573	1,075
Nursing Assistant	2,971	3,354	383	565	948
Cust Service Rep	1,898	2,311	413	516	929
Freight/Stock Mover	2,196	2,397	201	680	881

Source: MERIC Occupational Projections



Southwest Region

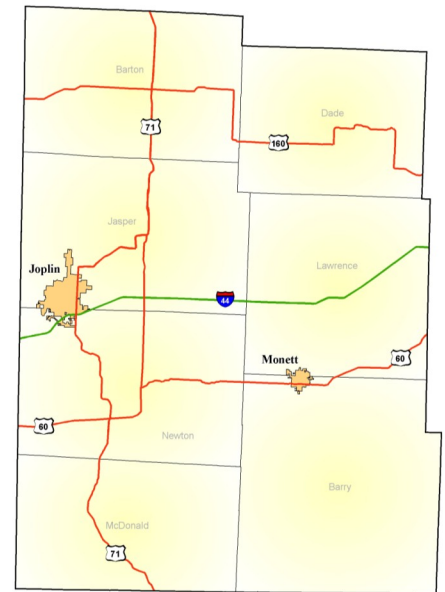
The Southwest Region is comprised of seven counties in the southwest corner of Missouri. This region is home to several major cities including Joplin and Monett.

Many of Missouri's major highways cross through this Region. Interstate 44 runs east/west through the center of the Region. In addition, Highway 60, Highway 160 and Highway 71 cross through the Region.

WORKFORCE DEMOGRAPHICS

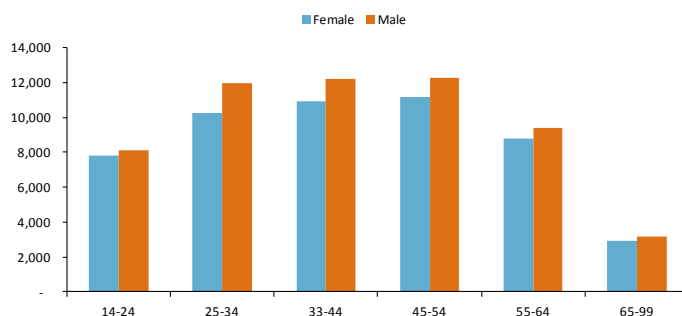
The Southwest Region has a workforce of over 109,000 employees who make up four percent of Missouri's employment. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

In the Southwest Region and Missouri, 22 percent of the workforce is age 55 or older. The 55 and older age cohort increased five percent since 2006. The increasing age of the workforce mirrors a larger trend that is occurring in Missouri and the United States.



In 2015, 47.6 percent of the workforce was female and 52.4 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 7.8 percent of the workforce was non-white, compared to 15.3 percent for the State; 6.8 percent was Hispanic or Latino, compared to 3.5 percent for Missouri.

**Workforce Age Groups
Southwest Region, 2015**

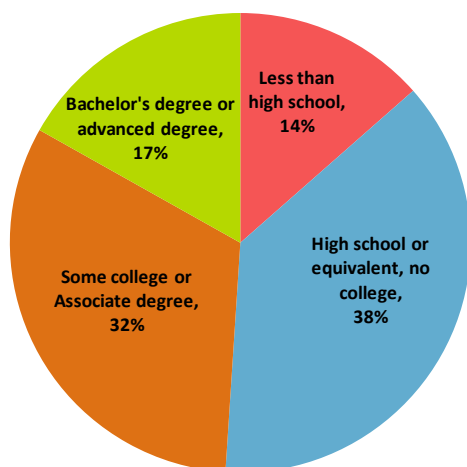


Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

For the Southwest Region, the primary language spoken at home is something other than English for 7.7 percent of the population, age 18 to 64. That compares to 6.6 percent for Missouri and 22.0 percent for the US. The Region has a higher percentage of the population with a disability compared to the State and Nation. For the Region, 14.4 percent of the population has a disability compared to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the Southwest Region workforce are below that of the rest of Missouri. In the Southwest Region, 87 percent of the workforce has a high school diploma or equivalent and 17 percent has a bachelor's or advanced degree. The Missouri workforce has an 88 percent rate with a high school diploma or equivalent and has 23 percent with a bachelor's or advanced degree.

**Educational Attainment
Southwest Region, 2015**



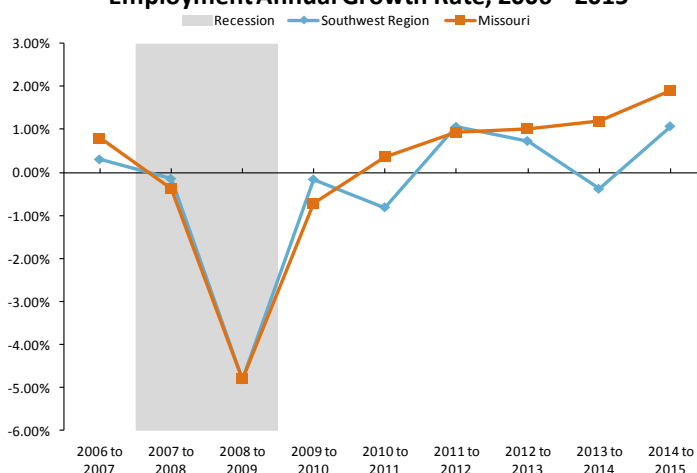
Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

INDUSTRY ANALYSIS

From 2007 to 2010, the Southwest Region lost nearly 7,000 jobs. From 2011 to 2015, employment levels have shown uneven growth, with an annualized rate of 0.5 percent. The Region has added 2,664 jobs over the five year span.

In 2015, the Region had a 1.1 percent growth in employment; that compares to 1.9 percent for the State. In four of the past five years, the Southwest Region had lower levels of employment growth than Missouri.

Employment Annual Growth Rate, 2006 - 2015



Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Manufacturing is the largest employing industry sector in the region, representing 21 percent of employment. *Manufacturing* lost 5,500 jobs from 2006 to 2011; from 2011 to 2015 it added back 350 jobs. *Health Care and Social Assistance* (representing 15 percent of employment) added about 850 jobs from 2011 to 2015, with an annualized growth rate of 1.09 percent.

The fastest growing employment sector from 2011 to 2015 was *Professional, Scientific, and Technical Services*.

Largest Employers in Southwest Region

The Region's top employers are based in *Health Care, Advanced Manufacturing* and *Computer Systems Design*. Top Health Care employers include **Freeman Health System** and **MHM Support Services**.

Top employing food manufacturers include **Tyson**, **Simmons Prepared Foods**, **George's Processing** and **Butterball**. Other major manufacturers include **EFCO Corp**, **La-Z-Boy**, **Leggett & Platt** and **Eaglepicher Technologies**. **Jack Henry & Associates** is a major employer in the Computer Systems Design field.

Missouri Southern State University is a major public sector employer in the Region.

Table 1: Southwest Region Top Industries by Employment, 2015

Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Manufacturing	22,401	22,755	354	0.3%	\$40,352
Health Care and Social Assistance	15,316	16,165	849	1.1%	\$40,106
Retail Trade	14,015	14,920	905	1.3%	\$24,516
Accommodation and Food Services	8,782	9,100	318	0.7%	\$13,418
Transportation and Warehousing	7,761	7,595	(167)	-0.4%	\$46,921
Educational Services	6,402	6,684	283	0.9%	\$31,908
Administrative and Support Services	5,222	5,500	278	1.0%	\$22,670
Construction	4,156	4,221	65	0.3%	\$38,434
Wholesale Trade	3,845	4,124	279	1.4%	\$40,044
Professional, Scientific, and Technical Services	1,745	3,218	1,472	13.0%	\$57,153

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

It had a growth rate of 13 percent, adding over 1,400 jobs; 1,112 of those jobs were added in 2012. *Table 1* provides a list of the top ten industry sectors for the region based on employment.

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. The Southwest Region has high concentrations in advanced manufacturing and *Truck Transportation* (see *Table 2*).

Table 2: Southwest Region Location Quotients

Industry Sector	Employment	Location
Food Mfg	8,997	7.4
Electrical Equip/Appliance/Component Mfg	1,559	5.2
Animal Production and Aquaculture	1,003	4.9
Truck Transportation	5,367	4.7
Furniture and Related Product Mfg	1,344	4.5
Fabricated Metal Product Mfg	3,314	2.9
Gasoline Stations	1,966	2.7
General Merchandise Stores	N/A	1.9
Hospitals	5,649	1.5
Building Material/Garden Equip Dealers	1,446	1.5
Motor Vehicle/Parts Dealers	2,141	1.4

Review of private businesses only.

Includes only employers with 1,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

LABOR MARKET ANALYSIS

Unemployment

The unemployment rate in the Region has consistently fallen from its peak in 2010. The regional unemployment rate reached 9.6 percent in July of 2010. By the end of 2015, the unemployment rate fell to 3.5 percent. This mirrors state and national trends, with the Region consistently maintaining unemployment rates below the state average.

Real-Time Labor Market Summary

Unemployment rates and civilian labor force participation levels are dependent on overall economic health and aggregate demand within an economy, but it is also impacted by the ability of the labor force to meet the demand for jobs within the region. To better understand the labor supply and demand within the region, a review was completed of the skills possessed by job seekers and comparing that to the online job ads.

Table 3 provides a count of online job ads in 2015 for the Southwest Region and compares it to job seeker data for people who registered with jobs.mo.gov.

Table 3: Real Time Labor Market Analysis, Southwest Region 2015										
	Total	Health Care & Related	Business & Sales	Transportation	Science & Technology	Other Services	Food Service	*CIMR	Management & Support	Production
Number of Job Ads	12,324	2,256	2,511	1,776	802	724	686	1,037	2,013	519
% of Job Ads	100%	18.3%	20.4%	14.4%	6.5%	5.9%	5.6%	8.4%	16.3%	4.2%
Number of Jobseekers	7,187	521	680	653	190	415	462	1,213	1,848	1,203
% of Jobs Sought	100%	7.3%	9.5%	9.1%	2.6%	5.8%	6.4%	16.9%	25.7%	16.7%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

The Real Time Labor Analysis shows that *Health Care* and *Business/Sales* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage for workers in these industry sectors. There may be an oversupply in the areas of *Production*, *Management/Support* and *Construction/Maintenance* related jobs, especially for lower skilled job seekers.

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. *Table 4* lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers*, *Personal Care Aides*, *Freight and Material Movers* and *Customer Service Representatives* project high growth and replacement openings. Due to high turn-over rates, these occupations have more replacement openings relative to other occupations.

Skilled occupations that have fewer replacement openings but high growth rates include *Registered Nurses*, *General and Operations Managers* and *Elementary School Teachers*. Middle skilled jobs, or jobs that require an associate's degree, technical degree or some post high school training other than a bachelor's degree, showing growth in the Southwest Region include *Truck Drivers*, *Nursing Assistants*, and *Industrial Machinery Mechanics*.

Top Ten Job Postings, 2015	
Occupation	Job Postings
Truck Drivers	1,780
Retail Salespersons	862
Registered Nurses	662
Customer Service Reps	479
Sales Reps, Wholesale/Mfg	438
First-Line Supervisors for Retail	395
Maintenance/Repair Workers	316
Freight/Stock Movers	281
Managers	249
First-Line Supervisors for Food Prep/Serving	236

Source: Burning Glass Technologies, Labor Insight

Table 4: Southwest Region Top Ten Long-Term Occupation Projections by Total Openings					
Occupation	2012 Estimated Employment	2022 Projected Employment	Growth Openings	Replacement Openings	Total Openings
Truck Driver	5,472	6,144	672	875	1,547
Retail Salesperson	3,880	4,079	199	1,327	1,526
Cashier	3,357	3,401	44	1,451	1,495
Food Prep/Serving	2,692	3,060	368	1,028	1,396
Freight/Stock Mover	2,224	2,510	286	689	975
Cust Service Rep	2,013	2,379	366	548	914
Waiter/Waitress	1,650	1,713	63	794	857
Registered Nurse	2,675	2,934	259	519	778
Office Clerk	2,765	2,952	187	581	768
Personal Care Aide	1,820	2,363	543	130	673

Source: MERIC Occupational Projections



St. Louis Region

The St. Louis Region is comprised of five counties and is located in the east central part of Missouri. The Region is home to several major cities including, Arnold, Washington, St. Charles, St. Peters, Florissant, O'Fallon, Chesterfield and the City of St. Louis.

As a major metropolitan area, many of Missouri's major roads cross through the Region, including interstate 70, Interstate 44, Interstate 55 and Interstate 64. In addition, Highway 50, Highway 40, Highway 61 and Highway 67 cross through the Region.

WORKFORCE DEMOGRAPHICS

The St. Louis Region has a workforce of over 1,040,000 who make up 40 percent of Missouri's employment. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

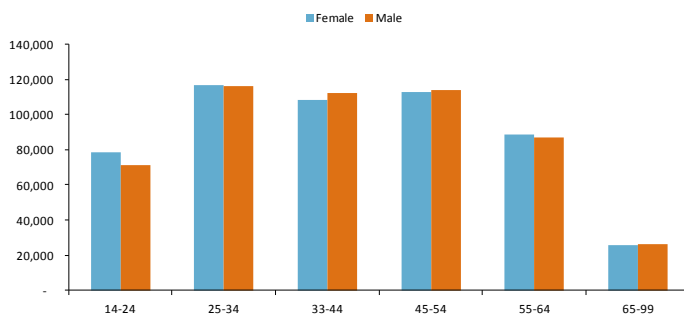
In the St. Louis Region and in Missouri 22 percent of the workforce is age 55 or older. The 55 and older age cohort increased six percent since 2006. The increasing age of the workforce mirrors a larger trend that is occurring in Missouri and the United States.



In 2015, 50.1 percent of the workforce was female and 49.9 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 21.1 percent of the workforce is non-white, compared to 15.3 percent for the State; 2.8 percent was Hispanic or Latino, compared to 3.5 percent for Missouri.

For the St. Louis Region, the primary language spoken at home is something other than English for 8.0 percent of the population age 18 to 64. That compares to 6.6 percent for Missouri and 22.0 percent for the US. The St. Louis Region has a lower percentage of the population with a disability compared to the State and Nation. For the Region, 9.8 percent of the population has a disability compared to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

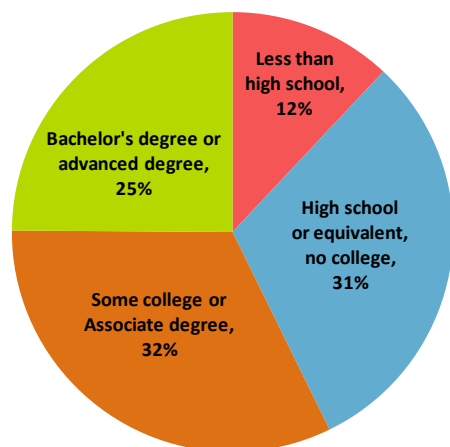
**Workforce Age Groups
St. Louis Region, 2015**



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

Educational attainment rates for the St. Louis Region workforce are above that of the rest of Missouri for bachelor's and advanced degrees. In the St. Louis Region, 88 percent of the population has a high school diploma or equivalent and 25 percent has a bachelor's or advanced degree. The Missouri workforce has an 88 percent rate with a high school diploma or equivalent and 23 percent with a bachelor's or advanced degree.

**Educational Attainment
St. Louis Region, 2015**



Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

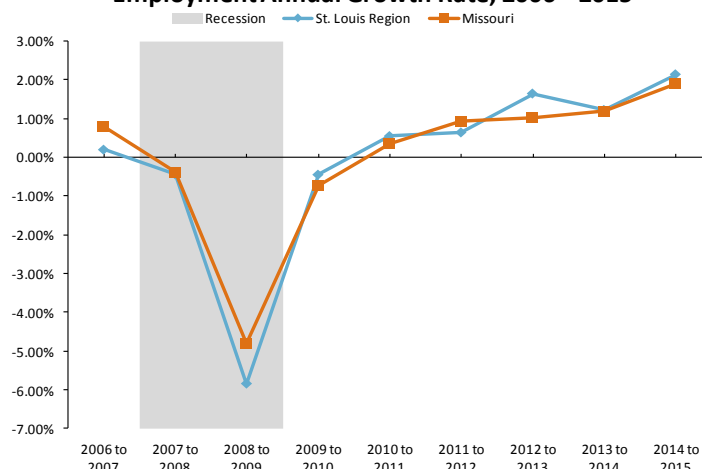
INDUSTRY ANALYSIS

In 2008, Employment in the St. Louis Region was 1,048,500. By 2010, employment levels fell below 979,000. From 2011 to 2015, employment levels grew at an annualized growth rate of 1.1 percent, adding over 56,700 jobs. In 2015, the Region had a 2.1 percent growth in employment, which is slightly above the 1.9 percent for Missouri.

Health Care and Social Assistance represents 17 percent of all employment in the Region, *Retail Trade* represents 11 percent, *Accommodation and Food Services* represents ten percent and *Manufacturing* represents nine percent.

Health Care and Social Assistance has been growing steadily over the past decade, showing positive

Employment Annual Growth Rate, 2006 - 2015



Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

employment growth every year from 2006 to 2015. From 2011 to 2015, *Health Care and Social Assistance* grew an annualized 2 percent, adding 16,624 jobs. *Retail trade* saw heavy declines in employment during the recession, losing nearly 7,500 jobs from 2007 through 2010. It has since rebounded adding back 5,580 jobs. *Accommodation and Food Services* saw declining

Largest Employers in the St. Louis Region

The largest employers in the St. Louis Region are in a variety of industries including health care, higher education, manufacturing and financial and insurance services. Top employers within health care include **Barnes-Jewish Hospital, St. Mary's Hospital, Mercy Hospital, St. Luke's Hospital** and **Missouri Baptist Medical Center**.

Headquarters operations such as **Anheuser-Busch, Monsanto** and **Express Scripts**, manufacturers **General Motors** and **Boeing**, and financial services providers **Edward Jones** and **Wells Fargo** rank among the top employers in their industry sectors.

St. Louis University, Washington University and the University of Missouri, St. Louis are also major employers in the Region.

Table 1: St. Louis Region Top Industries by Employment, 2015					
Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Health Care and Social Assistance	157,274	173,898	16,624	2.0%	\$46,657
Retail Trade	104,835	108,931	4,096	0.8%	\$28,783
Accommodation and Food Services	88,736	100,126	11,390	2.4%	\$17,298
Manufacturing	85,142	92,510	7,368	1.7%	\$67,734
Administrative and Support Services	63,542	69,983	6,441	1.9%	\$36,241
Educational Services	64,676	64,613	(63)	0.0%	\$45,340
Professional, Scientific, and Technical Services	57,175	61,684	4,509	1.5%	\$73,521
Finance and Insurance	52,058	55,105	3,046	1.1%	\$73,050
Construction	47,320	50,544	3,224	1.3%	\$58,142
Wholesale Trade	44,152	45,927	1,775	0.8%	\$66,871

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

employment during the recession but has grown since. From 2011 to 2015, it had an annualized growth rate of 2.4 percent.

Manufacturing jobs declined in the Region from 2006 to 2010. In that time nearly 27,000 jobs were lost. Since 2010, over 9,500 manufacturing jobs have been added. From 2011 to 2015, it grew an annualized 1.7 percent. *Administrative and Support Services* and *Professional, Scientific, and Technical Services* have also been adding a substantial amount of jobs to the Region during the economic recovery.

Finance and Insurance added over 3,000 jobs in the St. Louis Region from 2011 to 2015. It also had lower levels of job loss compared to other industries sectors during the recession. As a result, it is one of four industry sectors that had positive employment growth from 2006 to 2011, adding a net 4,000 new jobs over the ten year period. *Health Care and Social Assistance*, *Administrative Support Services* and *Accommodation and Food Services* were the other industry sectors with positive employment growth from 2006 to 2015. Table 1 lists the top ten industry sectors for the Region based on employment.

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. The St. Louis Region has high concentrations in *Management of Companies, Data Processing and Related Services* and *Transportation Equipment Manufacturing* (see Table 2).

Table 2: St. Louis Region Location Quotients		
Industry Sector	Employment	Location Quotient
Mgmt of Companies/Enterprises	40,155	2.4
Data Processing and Hosting	5,250	2.4
Transportation Equipment Mfg	22,453	1.9
Telecommunications	10,974	1.8
Chemical Mfg	10,308	1.7
Hospitals	61,671	1.7
Securities and Commodity Contracts	11,447	1.7
Machinery Mfg	11,547	1.4
Educational Services	25,055	1.3

Review of private businesses only.

Includes only employers with 5,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

LABOR MARKET ANALYSIS

Unemployment

The unemployment rate in the Region has consistently fallen from its peak in 2009. The regional unemployment rate reached 10.3 percent in June of 2009. By the end of 2015, the unemployment rate fell to 3.6 percent. This mirrors state and national trends, with the Region consistently maintaining unemployment rates below the state average.

Real-Time Labor Market Summary

Unemployment rates and civilian labor force participation levels are dependent on overall economic health and aggregate demand within an economy, but it is also impacted by the ability of the labor force to meet the demand for jobs within the region. To better understand the labor supply and demand within the region, a review was completed of the skills possessed by job seekers and comparing that to the online job ads.

Table 3 provides a count of online job ads in 2015 for the St. Louis Region and compares it to job seeker data for people who registered with jobs.mo.gov.

The Real Time Labor Market Analysis shows that *Science/Technology*, *Business/Sales* and *Health Care* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage for workers in these industry sectors. This analysis shows an oversupply in the areas of *Management/Support*, *Production* and *Construction/Maintenance* related fields, especially for lower skilled job seekers.

Top Ten Job Postings, 2015	
Occupation	Job Postings
Registered Nurses	12,780
Computer Occupations	7460
Software Developers	6786
Sales Reps, Wholesale/Mfg	6419
Retail Salespersons	5525
Truck Drivers	5221
Customer Service Reps	5078
Managers	4726
Accountants and Auditors	3508
First-Line Supervisors for Retail	3332

Source: Burning Glass Technologies, Labor Insight

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. Table 5 lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers*, *Customer Service Representatives*, *Janitors and Cleaners* and *Personal Care Aides*, project high growth and replacement openings. Due to high turn-over rates, these occupations have more replacement openings relative to other occupations.

Skilled occupations that project a high amount of growth openings include *Registered Nurses*, *General and Operations Managers*, *Computer Systems Analyst* and *Software Developers*. Middle skilled jobs, or jobs that require an associate's degree, technical degree or some

Table 3: Real Time Labor Market Analysis, St. Louis Region 2015										
	Total	Science & Technology	Business & Sales	Health Care & Related	Other Services	Transportation	Food Service	Management & Support	Production	*CIMR
Number of Job Ads	175,610	36,251	35,152	31,345	9,352	8,047	6,095	38,190	3,734	7,444
% of Job Ads	100%	20.6%	20.0%	17.8%	5.3%	4.6%	3.5%	21.7%	2.1%	4.2%
Number of Jobseekers	39,108	1,750	4,171	3,866	2,227	3,107	2,992	11,397	4,133	5,464
% of Jobs Sought	100%	4.5%	10.7%	9.9%	5.7%	7.9%	7.7%	29.1%	10.6%	14.0%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

post high school training other than a bachelor's degree, showing growth in the St. Louis Region include *Nursing Assistants, Carpenters and Truck Drivers*.

Table 5: St. Louis Region Long-Term Occupation Projections					
Occupation	2012 Estimated Employ- ment	2022 Projected Employ- ment	Growth Openings	Replace- ment Openings	Total Openings
Food Prep/Serving	27,087	30,373	3,286	10,343	13,629
Retail Salesperson	30,726	32,328	1,602	10,510	12,112
Cashier	24,220	24,416	196	10,471	10,667
Waiter/Waitress	20,082	20,744	662	9,662	10,324
Cust Service Rep	21,504	24,731	3,227	5,851	9,078
Registered Nurse	29,548	32,676	3,128	5,729	8,857
General/Ops Mngr	20,881	23,323	2,442	3,906	6,348
Office Clerks	22,735	24,280	1,545	4,776	6,321
Freight/Stock Mover	13,750	15,432	1,682	4,259	5,941
Janitor/Cleaner	15,744	18,118	2,374	2,963	5,337

Source: MERIC Occupational Projections



West Central Region

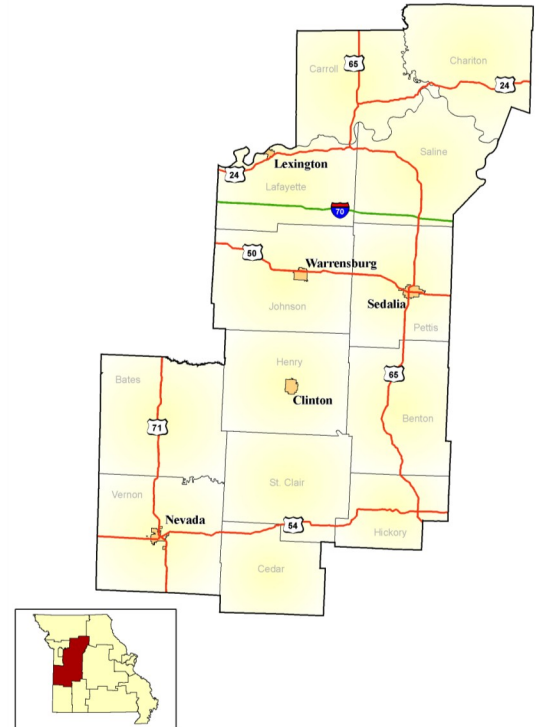
The West Central Region is comprised of 13 counties in the west central part of Missouri. This Region is home to major cities including Warrensburg, Sedalia, Lexington, Clinton and Nevada.

Many of Missouri's major highways cross through the Region. Interstate 70 runs through the northern part of the Region. In addition, Highway 50, Highway 54 and Highway 24 cross east/west through the Region, while Highway 65 and Highway 71 run north/south.

WORKFORCE DEMOGRAPHICS

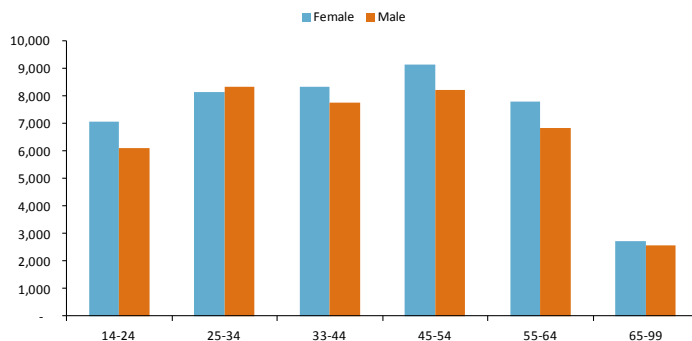
The West Central Region has a workforce of over 82,000 employees who make up three percent of Missouri's workforce. (In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2015.)

In the Region, 24 percent of the workforce is age 55 or older, compared to 22 percent for Missouri. The 55 and older age cohort increased five percent since 2006. The increasing age of the workforce mirrors a larger trend that is occurring in Missouri and the United States.



In 2015, 52 percent of the workforce was female and 48 percent was male, which compares to 50.2 percent female and 49.8 percent male for Missouri. For the Region, 6.7 percent of the workforce was non-white; compared to 15.3 percent for the State; 3.7 percent was Hispanic or Latino, compared 3.5 percent for Missouri.

**Workforce Age Groups
West Central Region, 2015**

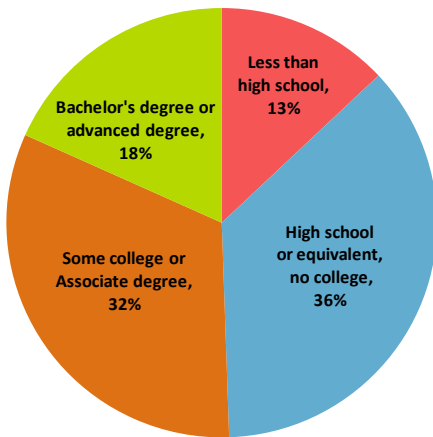


Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

For the West Central Region, the primary language spoken at home is something other than English for 5.0 percent of the population age 18 to 64. That compares to 6.6 percent for Missouri and 22.0 percent for the US. The West Central Region has a higher percentage of the population with a disability compared to the State and Nation. For the Region, 16.7 percent of the population has a disability compared to 12.4 percent in Missouri and 10.2 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the West Central Region workforce are below that of the rest of Missouri. In the West Central Region, 87 percent of the population has a high school diploma or equivalent and 18 percent has a bachelor's or advanced degree. The Missouri workforce has an 88 percent rate with a high school diploma or equivalent and has 23 percent with a bachelor's or advanced degree.

**Educational Attainment
West Central Region, 2015**

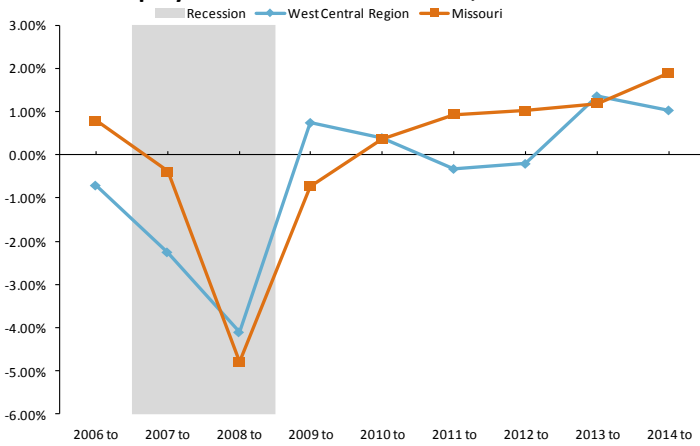


Source: US Census Bureau, Longitudinal Employer-Household Dynamics, 3rd Quarter 2015

INDUSTRY ANALYSIS

In 2006, for the West Central Region, employment was at 85,700; by 2009 employment fell to below 78,000. Since 2009, the Region has added nearly 2,400 jobs.

Employment Annual Growth Rate, 2006 - 2015



Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

From 2011 to 2015, employment levels have shown uneven growth, with an annualized growth rate of 0.4 percent. In 2015, the Region had a 1.0 percent growth in employment. That compared to 1.9 percent for the State.

Healthcare and Social Assistance, Manufacturing and Retail Trade are the three largest employing industry sectors in the Region. *Health Care and Social Assistance* represents 20 percent of all employment in the Region and has been growing throughout the past ten years. From 2011 to 2015, it grew at an annualized growth rate of 1.1 percent, adding 835 jobs.

Manufacturing, representing 14 percent of employment, saw heavy job losses from 2006 to 2009, losing over 3,400 jobs. From 2008 to 2009, 779 jobs were added back. From 2011 to 2015, manufacturing jobs declined slightly, with an annualized growth rate of -0.21 percent. *Retail trade* saw job decline during the recession and has since shown job growth. From 2011 to 2015, *Retail Trade* had an annualized growth rate of 0.5 percent.

Agriculture, Forestry, Fishing and Hunting was the fastest growing industry in the Region from 2011 to 2015.

Largest Employers in the St. Louis Region

The Region's top employers are based in health care and advanced manufacturing. Top Health Care employers include **Bothwell Regional Health Center**, **Fitzgibbon Hospital** and **Western Missouri Medical Center**.

Top employing food manufacturers include **Tyson** and **ConAgra Foods**. Other major manufacturers include **Energys Energy Products**, **Maxion Wheels**, **Waterloo Industries**, and **3M Company**.

Large public sector employers include **Whiteman Air Force Base** and the **University of Central Missouri**.

West Central Region Top Industries by Employment, 2015					
Industry Sector	2011 Employment	2015 Employment	Net Change	2011-2015 Employment CAGR*	2015 Average Annual Wage
Health Care and Social Assistance	15,194	16,029	835	1.1%	\$30,398
Manufacturing	11,681	11,556	(125)	-0.2%	\$40,743
Retail Trade	10,897	11,174	277	0.5%	\$23,314
Accommodation and Food Services	7,211	7,262	51	0.1%	\$12,461
Educational Services	7,258	7,118	(140)	-0.4%	\$32,965
Public Administration	5,125	5,088	(37)	-0.1%	\$34,365
Construction	3,327	3,700	373	2.1%	\$43,831
Finance and Insurance	2,675	2,719	44	0.3%	\$42,194
Wholesale Trade	2,493	2,712	219	1.7%	\$41,278
Administrative and Support Services	2,293	2,662	369	3.0%	\$22,181

*CAGR = Compound Annual Growth Rate

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Although it represents only two percent of employment in the Region, it added the second most jobs (417) over those five years. *Table 1* lists the top ten industry sectors by employment for the Region.

Location Quotient

To understand the major industries within a region, an analysis of the concentration of industries or clustering can be useful. The Location Quotient describes how concentrated an industry is in a region in relation to the nation, with 1.0 being the national average. The West Central Region has high concentrations in advanced manufacturing, including *Food Manufacturing*, *Machinery Manufacturing* and *Fabricated Metal Product Manufacturing* (see *Table 2*).

LABOR MARKET ANALYSIS

Unemployment

The unemployment rate in the Region has consistently fallen from its peak in 2010. The regional unemployment rate reached 11.0 percent in February of 2010. By the end of 2015, the unemployment rate fell to 4.3 percent. This mirrors state and national trends, with the Region consistently maintaining unemployment slightly above the state average.

Table 2: West Central Region Location Quotients		
Industry Sector	Employment	Location Quotient
Food Mfg	3,683	4.1
Gasoline Stations	1,917	3.6
Machinery Mfg	1,495	2.3
Nursing/Residential Care	4,089	2.1
Building Material/Garden Equip Dealers	1,258	1.7
Fabricated Metal Product Mfg	1,366	1.6
Social Assistance	3,194	1.6
Motor Vehicle and Parts Dealers	1,737	1.5
General Merchandise Stores	N/A	1.4
Credit Intermediation	1,966	1.3

Review of private businesses only.

Includes only employers with 1,000 employees or more.

Source: MERIC, Quarterly Census of Employment and Wages, 3rd Quarter

Real-Time Labor Market Summary

Unemployment rates and civilian labor force participation levels are dependent on overall economic health and aggregate demand within an economy, but it is also impacted by the ability of the labor force to meet the demand for jobs within the region. To better understand the labor supply and demand within the region, a review was completed of the skills possessed by job seekers and comparing that to the online job ads.

Table 3 provides a count of online job ads in 2015 for the West Central Region and compares it to job seeker data for people who registered with jobs.mo.gov.

The Real Time Labor Market Analysis shows that *Health Care* and *Business/Sales* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage for workers in these industry sectors. There also may be an oversupply in the areas of *Construction/Maintenance* and *Production* related fields, especially for lower skilled job seekers.

Top Ten Job Postings 2015	
Occupation	Job Postings
Truck Drivers	1,259
Registered Nurses	827
Retail Salespersons	397
LP and LV Nurses	269
Cust Service Reps	236
First-Line Supervisors for Retail	214
Nursing Assistants	204
Sales Reps, Wholesale/Mfg	204
Freight/Stock Movers	163
Physical Therapists	152

Source: Burning Glass Technologies, Labor Insight

Table 3: Real Time Labor Market Analysis, West Central Region 2015										
	Total	Health Care & Related	Business & Sales	Science & Technology	Transportation	Other Services	Food Service	Management & Support	*CIMR	Production
Number of Job Ads	7,093	2,254	1,144	322	596	438	249	1,195	586	309
% of Job Ads	100%	31.8%	16.1%	4.5%	8.4%	6.2%	3.5%	16.8%	8.3%	4.4%
Number of Jobseekers	7,315	711	607	179	567	515	590	1,680	1,272	1,194
% of Jobs Sought	100%	9.7%	8.3%	2.4%	7.8%	7.0%	8.1%	23.0%	17.4%	16.3%

*Construction, Installation, Maintenance & Repair

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, jobs.mo.gov

Occupational Projections

Occupational projections are an indicator of future labor demand for the Region. Table 4 lists occupations projected to have the most total openings between 2012 and 2022.

Low-skill, low-wage occupations such as *Food Preparation and Serving Workers*, *Retail Salespersons*, *Personal Care Aides* and *Secretaries and Administrative Assistants*, are projected to have high growth openings and replacement openings. Because of high turn-over rates, these occupations have more replacement openings compared to other occupations.

Skilled occupations that project a high amount of growth openings include *Registered Nurses*, *General and Operations Managers* and *Elementary School Teachers*. Middle skilled jobs or jobs that require an associate's degree, technical degree or some post high school

training other than a bachelor's degree showing growth in the West Central Region include *Nursing Assistants*, *Licensed Practical and Licensed Vocational Nurse*, *Truck Drivers* and *Cooks*.

Table 4: West Central Region Top Long-Term Occupation Projections by Total Openings					
Occupation	2012 Estimated Employ- ment	2022 Projected Employ- ment	Growth Openings	Replace- ment Openings	Total Openings
Food Prep/Serving	2,648	3,060	412	1,011	1,423
Cashier	2,897	3,010	113	1,252	1,365
Retail Salesperson	2,314	2,510	196	791	987
Waiter/Waitress	1,362	1,436	74	655	729
Nursing Assistant	1,995	2,228	233	379	612
Office Clerk	1,930	2,037	107	405	512
Personal Care Aide	1,576	1,962	386	113	499
Registered Nurse	1,367	1,560	193	265	458
Elementary Teacher	1,320	1,469	149	290	439
Freight/Stock Mover	1,093	1,190	97	339	436

Source: MERIC Occupational Projections



Data Sources

Missouri Economy Defined.....pp. 3 - 6

Gross Domestic Product

U.S. Bureau of Economic Analysis. Regional Economic Accounts Data: Interactive Tables, Quarterly GDP by State, real GDP in chained dollars. <http://www.bea.gov/regional/index.htm>

MERIC. February 2016. *Missouri Economic Diversity Brief*. https://www.missourieconomy.org/pdfs/edi_2014_brief.pdf

Personal Income

U.S. Bureau of Economic Analysis. Regional Economic Accounts Data: Interactive Tables, Quarterly State Personal Income. Table SQ1— Personal Income, Population, Per Capita Personal Income; Table SQ4— Personal Income by Major Component; Table SQ35— Personal Current Transfer Receipts. <http://www.bea.gov/regional/index.htm>

MERIC. 2016. *Cost of Living Data Series*. https://www.missourieconomy.org/indicators/cost_of_living/index.stm

Civilian Labor Force

U.S. Census Bureau. Current Population Survey, CPS Table Creator. <http://www.census.gov/cps/data/cpstablecreator.html>

U.S. Bureau of Labor Statistics. Local Area Unemployment Statistics. *States and selected areas: Employment status of the civilian non-institutional population, January 1976 to date*. <http://www.bls.gov/lau/ststdsadata.txt>

Employment and Unemployment

MERIC in cooperation with the U.S. Bureau of Labor Statistics. Wage and Salary Employment Tables. <https://www.missourieconomy.org/industry/ces/default.aspx>

MERIC in cooperation with the U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages, micro-data, 2006-2015.

MERIC in cooperation with the U.S. Bureau of Labor Statistics. Local Area Unemployment Statistics. Seasonally adjusted. <https://www.missourieconomy.org/indicators/laus/default.aspx?sa=1>

Regional Analysispp. 7 - 51

U.S. Department of Labor, Employment and Training Administration (ETA). The Workforce Innovation and Opportunity Act of 2014. <https://www.doleta.gov/wioa/>

Workforce Demographics

U.S. Census Bureau. Longitudinal Employer Household Dynamics (LEHD). LED Extraction Tool. Worker characteristics by Sex and Age; by Sex and Education. <http://ledextract.ces.census.gov/>

U.S. Census Bureau. American Community Survey (ACS), Five-Year Estimates. Disability by Sex by Age by Employment Status. Table B18020. <http://factfinder.census.gov>

U.S. Census Bureau. American Community Survey (ACS), Five-Year Estimates. Language Spoken at Home by Ability to Speak English. Table B16001. <http://factfinder.census.gov>.

Industry Analysis

MERIC in cooperation with the U.S. Bureau of Labor Statistics. Quarterly Census of Employment and Wages (QCEW), 3rd Quarter, micro-data.

Infogroup[®] Largest Employers from InfoUSA database.

Labor Market Analysis

MERIC in cooperation with the U.S. Bureau of Labor Statistics. Local Area Unemployment Statistics (LAUS). Data not seasonally adjusted. <https://www.missourieconomy.org/indicators/laus/default.aspx>

Missouri Division of Workforce Development. Missouri Jobs. <https://jobs.mo.gov/>

Burning Glass Technologies. Labor Insight[™]. <http://burning-glass.com/labor-insight/>

Occupational Projections

MERIC in cooperation with the U.S. Bureau of Labor Statistics. Occupational Employment Projections. https://www.missourieconomy.org/occupations/occ_proj.stm



Appendix

Missouri Workforce Development Regions by County				
Central	Kansas City	Northeast	Northwest	Ozark
Audrain	Cass	Adair	Andrew	Christian
Boone	Clay	Clark	Atchison	Dallas
Callaway	Jackson	Knox	Buchanan	Greene
Camden	Platte	Lewis	Caldwell	Polk
Cole	Ray	Lincoln	Clinton	Stone
Cooper		Macon	Daviess	Taney
Crawford		Marion	Dekalb	Webster
Dent		Monroe	Gentry	
Gasconade		Montgomery	Grundy	
Howard		Pike	Harrison	
Laclede		Ralls	Holt	
Maries		Randolph	Linn	
Miller		Schuyler	Livingston	
Moniteau		Scotland	Mercer	
Morgan		Shelby	Nodaway	
Osage		Warren	Putnam	
Phelps			Sullivan	
Pulaski			Worth	
Washington				
St. Louis	Southeast	Southwest	South Central	West Central
Franklin	Bollinger	Barry	Butler	Bates
Jefferson	Cape Girardeau	Barton	Carter	Benton
St. Charles	Dunklin	Dade	Douglas	Carroll
St. Louis	Iron	Jasper	Howell	Cedar
St. Louis City	Madison	Lawrence	Oregon	Chariton
	Mississippi	McDonald	Ozark	Henry
	New Madrid	Newton	Reynolds	Hickory
	Pemiscot		Ripley	Johnson
	Perry		Shannon	Lafayette
	Ste. Genevieve		Texas	Pettis
	St. Francois		Wayne	St. Clair
	Scott		Wright	Saline
	Stoddard			Vernon

2016

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About the Missouri Economic Research and Information Center

The Missouri Economic Research and Information Center (MERIC) provides comprehensive analysis of Missouri's socioeconomic environment at the local, regional and state levels. To achieve this, MERIC employs a wide array of tools, which include econometric models, geographic information systems and advanced statistical methods. On-going projects at MERIC include targeted development, economic and social impact assessments, industry and occupational analyses, career seeker products and information on Missouri's demographic and economic trends.

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